Hellworld: The Human Species and the Planetary Factory

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Hellworld: The Human Species and the Planetary Factory

By

Phil A. Neel

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No book can be adequately captured in the name of an author. Voices drown in the currents of history, sweat pours into dust, blood spills warm on the street, and sometimes words are etched from this tumult of flesh in the shape of a book. This mass of text is the collective product of an era. The process of writing it has been a torture: long nights breathing teargas, bruised and beaten by the police, long months of imprisonment, long days spent under the hot sun in dust-choked industrial districts throughout the world, long hours bleeding my own life out in fields, kitchens, and warehouses in exchange for a wage to fund the writing, the research, the travel, brought again and again to the edge of homelessness. And the finished product is itself a burden that I now share with you.

If the book had a beginning, it was with the Great Recession of 2008 and the ugly years that followed, when copper was mined from the walls of abandoned housing developments and insurrections sparked across the world only to be stomped out one by one. The initial insights of this book were forged in those fires and refined in the many fires that followed. It is therefore fitting, I think, that this text is roughly the size and weight of a brick. Meanwhile, if the book had an ending, it would be when any remaining sense of 'authorship' was eroded under the force of history, and its writer remade into a collective vessel for truths that brim beyond what a single body can contain. There are too many people to acknowledge in full, and many of those most worthy of acknowledgement must, of necessity, remain anonymous. First and foremost, I must thank the dead: those who I have known and those who I have not. Second, I must thank the many comrades-in-arms who I never met but who I nonetheless fought alongside silently, in pitched street battles stretching through the decades. To both the dead and the living, I imagine that we will meet again in that tranquil light that falls through the smoke of burning cities.

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The communist tendency that took shape out of the Occupy movement and first round of Black Lives Mater protests in the early-to-mid-2010s – accompanied by subsequent study groups on *Capital*, on Alain Badiou's political philosophy, on theories of racialization, and on 'communization' and 'value-form theory' – were crucial in forming many of the ideas outlined here. In this regard, I am grateful for the early debates that emerged in the Wildcat social centre, at Seattle's short-lived anarchist coop café Black Coffee, and in myriad forest outings across the Pacific Northwest. This includes many, inevitably anonymous insurrectionaries, prisoners, and other persons of ill-repute much like myself – you all know who you are, wherever you are. In particular, thanks to Danielle and Carson for providing support in the midst of SWAT raids and sudden betrayals, and thanks to Lainie, Harper, Derek, Key, and Kyle for offering an intellectual anchor in the aftermath, not to mention inaugurating the new era of communist physical culture in the Northwest via our small weightlifting and martial arts clubs. Within the broader milieu, the questions posed by Maya Gonzalez and Aaron Benanav helped to focus my theoretical concerns, while Jasper Bernes and Joshua Clover were integral in knitting together an otherwise disparate 'tendency' into a coherent communist current.

Soon after, my experience gradually broadened to include increasing influence from the handful of Western communists and anarchists interested in China and from the existing Sinophone left, most of whom cannot be named for reasons of security. In a few cases, first initials will be suitable: M and J

spanned both worlds, leading study groups on Marx and *Endnotes* in Seattle before introducing me to the industrial districts of the Chinese sunbelt and, alongside S, leading a series of discussions on the pace and character of agrarian change in China. K, L, R, RR, M, C, H, E, G, SC, NC, TZ, LZ, WQ (I sincerely apologise if I'm forgetting any other letters of the alphabet) helped to form a vibrant intellectual milieu spanning the language gap and, through a series of translation projects, have moved continents to bring the modern Chinese and Anglophone communist and anarchist circles into discussion with one another. Similarly, I am grateful for Lala's attentive tours of Hong Kong – always filled with detailed political histories and innumerable Cantonese insults – and Fei Fei's introductions to Guangzhou and Zhanjiang, which I later repaid in kind with a tour of the somewhat less illustrious city of Tacoma.

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Note on Languages

Chinese

Chinese authors are named according to the Chinese convention, placing surname first – unless the printing of their name clearly indicates an alternative preference, as when an author has an English first name. In the bibliography, this amounts to nothing more than the removal of the comma separating first and last names.

For Chinese words used in the text, two conventions are used. In general, anywhere that a Chinese term is referred to directly or requires clarification in a quote, the Chinese characters will be used. However, when a term is commonly known by its Chinese name within the scholarship and is intended to be read in the flow of the English sentence, toneless pinyin will be used instead, and the word placed in italics. This is the case for terms such as *hukou*, referring to the household registration system in China, which has a large body of English-language literature affiliated with it.

Swahili

Swahili requires very little transliteration or explanation. It is conventionally written in the Latin alphabet. The only unfamiliar convention is the noun-class system, insofar as it defines singular vs. plural status. This status is indicated at the head of the word in Swahili by a transformation of the initial syllable or the addition of an initial syllable. For instance, 'factory' in the singular is *kiwanda*, while 'factory' in the plural is *viwanda*, 'car' in the singular is *gari*, while 'cars' in the plural is *magari*. The exact conventions depend on the noun-class. These conventions are not important to explain here. In general, the singular or plural will be used to match the definition given in English. In some cases, both will be communicated using a slash. For example: *ma/gari* to indicate car(s).

Whenever a new Swahili term is used, it will be italicized and immediately defined. After that, it may be used again on its own to communicate qualitative distinctions that are more difficult to communicate in English.

Thai

Since very few Thai terms appear in the book, they are anglicized and placed in italics, with no use of the Thai alphabet. Thai naming conventions are followed, in which the given name comes first and surname comes second *but the given name is used to refer to individuals in a formal setting*. Thus, former president Thaksin Shinawatra is referred to as 'Thaksin,' rather than 'Shinawatra,' despite the latter being the surname.

Reading Guide

This book is a test in endurance. The project involved research conducted across three continents over the course of ten to fifteen years. The final stretch of writing took three to four years, preceded by two years of drafting preliminary material in the form of a doctoral dissertation. The extensive, nearly unpublishable length of the resulting text and accompanying charts, maps, and images, ensures that many readers will struggle to digest the material. As a result, this will not be a popular book. Few will pick it up in the first place and even fewer will finish it. Among those who do attempt a reading, most will come to despise it. And yet this difficulty is intentional. The book is designed, in part, to be an immersive torture, emulating its topic. But it is also simply a large text focused on a breadth of issues, written in an older style. Meanwhile, by refusing the conventional narrative practices deployed in most 'theoretical' appraisals of 'political-economic' topics and instead adopting a literary approach, the book is also certain to be polarising – for reasons of political purity, as much as aesthetic preference. Despite all this, it is ultimately intended to be suffered in its entirety. As with any challenge, the difficulty is itself the benefit and the reader, in yielding to the passage of the pages – allowing the book to be a thing that happens, rather than an object on which one must act – will discover in them a design to strengthen the will and, with it, the intellect.

Nonetheless, ours is an era of wasteful pleasure and reckless temper in which weakness prevails, attention atrophies, and food is softened to suppress any sense of satiation. As a result, it is today rare to find those few capable or willing to truly engage with the unforgiving texts of this older style – *Capital* is perhaps the grandest example – which require an exertion of real effort to unbind. And yet this exertion is precisely what strengthens the mind. Without it, one might 'read' while failing to learn. Learning is itself a collaborative form of suffering. The margins are meant to be written in. This black ink is meant to be coloured over in bright highlights and vigorously underlined. These words are half of a dialogue awaiting their counterpart. The texture of the paper communicates, as does the heft of spine and binding – woe to all who abandon the tactile in the name of the tablet, since knowledge enters through the flesh. But there is no getting around it. All art is, inevitably, slaughtered for an audience, its gut cut open and the 'content' drawn from it like dripping bowels. I therefore offer a guide to orient the reader, indicating where the cuts might best be made.

First, the text can be sorted according to temperament. As will be immediately obvious, the book makes wide-ranging use of both slightly overwrought literary niceties and somewhat obsessive statistical detail. Readers who have

no stomach for the desserts of storytelling and metaphor – those who despise fiction, in particular – can opt for an 'illiterate' reading, in which the framing narrative is skipped in favour of the meat and potatoes of numbers and 'analysis.' In general, this reading can be performed by skipping both the first and last few paragraphs of every chapter (or, in some cases, the entire introductory section and the final paragraph). While literary features will recur throughout the body of the text and may arrive suddenly, readers opting for this path can usually be forewarned by an increasing frequency of alliteration and by the extending cadence of the sentences, beyond which will invariably be found some fanciful nonsense in which bleak figures shuffle through blood-spattered industrial landscapes and the wind whips the earth without mercy. The most astute and straight-to-business of these readers may even find the greatest benefit in simply scanning each chapter for numbers, figures, maps, and the like, so that there is even less risk of coming across any untoward verbiage.

By contrast, readers who find aesthetic pleasure in the niceties of language but tend to suffer under the barrage of numbers, figures, and, most of all, obtuse theoretical constructions (and the graceless blockquotes that invariably accompany them) may benefit from an 'innumerate' reading, in which the text is artificially softened through the exclusion of econometrics and any other fibrous matters of rigor or method. Readers taking this approach will find most of the material they need offered in the introduction and conclusion to each respective chapter and, within the chapter, in the first and last few paragraphs of each section. The middles can be scanned for numbers, the charts can be glanced over, and the maps can be examined only if they prove to be aesthetically pleasing. Some chapters even have pictures. Of particular interest will be the sections of **Chapter 5**, **Chapter 9**, and **Chapter 10**, that discuss cultural trends, as well as the slightly overwrought gothic tropes throughout. Finally, given the physical heft of the finished product, readers of this predilection may also find it beneficial to invest in a bookstand, so as not to accidentally build any muscle in lifting the manuscript.

But the text can also be mined, as it were, for topics of interest. The **Introduction** is designed to gradually lower the reader in the gothic style – readers who cannot palate those first few paragraphs are advised to adopt the 'illiterate' reading outlined above – and to provide a relatively accessible overview of the key concerns, which are initially presented in their mundane forms-of-appearance: the apparent decline of the US, the apparent rise of China, the apparently all-encompassing power of capitalism over our lives. These forms of appearance will then be subject to increased scrutiny in the following chapters. Finally, via its discourse with Camatte, the **Introduction** also presents the basic political conundrum that will be unpacked throughout the text: the question

of how revolutionary subjectivity can emerge despite the 'totalising' character of capital and its 'domesticating' force. Fair warning for the faint of heart, the **Introduction** also includes true stories about a child getting their skin burned off in a vat of water meant to boil pig carcasses for scraping and an entire family drowning in liquefied manure. Those who cannot stomach these brutal realities are advised to put this book down immediately, bind it in chains of pure silver, and bury it in the cellar.

In terms of content, the book is divided into two halves. **Part 1** is, broadly, 'esoteric,' concerned with gradually building up the theoretical approach necessary to understand the ritual structure or 'social logic' of capitalist society, which will then illuminate the mundane detail throughout the other chapters. Geographically, **Part 1** focuses on global trends as manifest in mainland China, since Chinese industrial districts serve as the heart of the planetary factory. But the goal of these chapters is ultimately to dissolve the colloquial narrative of an 'ascendant China' and a 'decaying US hegemony,' demonstrating instead that it is impossible to speak of either the US, China, or any other country as possessing its own distinctly national 'political economy' that can be examined in isolation. Perhaps the core claim made in **Part 1** is that capitalism is not a collection of nationally-delimited 'political economies,' nor even a global economic system, but is instead a form of social organisation, planetary in scale, wherein masses of material and billions of bodies are made to accord with supervening imperatives set by an overarching 'logic' operating at an emergent level of agency, beyond the control of even the most powerful individuals who embody it.

Chapter 1 examines the enclosure of the planet by this social system, as represented in the incorporation of mainland China into the market. In particular, it focuses on the burst of infrastructure and real estate development that followed the Great Recession and associated plateau in global trade, as well as the ensuing land conflicts and credit bubble. **Chapter 2** then addresses the material character of this planetary system, measuring total flows of anthropic mass and their close link to economic activity, arguing that purely technical explanations fail to adequately capture the social dynamics driving these material flows. **Chapter 3** turns to the industrial system itself, examining the case of the electronics industry in Shenzhen and the global supply chains that structure it. The chapter also serves as an overview of labour struggles in China over the first two decades after the turn of the century, all read alongside the poetry of former Foxconn worker Xu Lizhi, who died by suicide not far from the factory gates.

The last two chapters then sink more deeply into theoretical topics, spiralling toward madness. **Chapter 4** examines questions of revolutionary subjectiv-

ity, the theory of value, and the zoning of productive knowledge through an exploration of the commercial labyrinths beneath the factory cities. **Chapter 5** then illustrates these theoretical insights in a series of vignettes drawn from China's northeastern rustbelt, ranging from the films of director Geng Jun to the emergence of the *hanmai* music genre, the rise of the livestreaming industry, the online discourse of the "Industrial Party," and digital depictions of agrarian utopia. It also examines the secessionist and suicidal aspects of recent class struggles in China, Brazil, and the United States. This first half of the book therefore ends on a particularly bleak note and, again, includes a number of gruesome stories of death and dismemberment.

With the theoretical foundation established, **Part 2** then begins a similarly spiralling ascent up out of the madness. This second half offers a generally 'exoteric' account, concerned with concrete cases of development, state construction, and, in particular, mass politics. Geographically, it proceeds out of mainland China into the rest of Asia, analysing the history of Hong Kong, the development of the Pacific Rim industrial complex (with an extended historical detour into early developmental trends in the UK and US), the warring populist politics of Thailand, and then passes across the Indian Ocean to illustrate the conundrum of 'premature deindustrialisation' in East Africa and the various class struggles and intra-elite conflicts that follow from it. The core theme of **Part 2** is the 'conjunctural' analysis of particular historical moments, including both structural and subjective factors, all to illustrate a more general theory of the state and the revolutionary subjectivity that takes shape in opposition to it, each driven by the intractable contradictions that continually destabilise the social system as a whole.

Chapter 6 and **Chapter 7** each focus on the case of Hong Kong. **Chapter 6** provides a general case study of the island's development as a former British colony and its gradual handover to the mainland, accompanied by distinct shifts in the composition of elite power. This chapter uses the unique circumstances of Hong Kong to illuminate the character of the state as an emanation of class power. **Chapter 7** then examines the build-up of social unrest in the city over the course of the 2010s, peaking with the uprising in 2019 and its grim aftermath. The politics of various factions in the uprising are examined in detail, as are the structural constraints that predisposed protestors toward certain paths and not others. The question of revolutionary subjectivity and its relationship with productive knowledge is a central theme.

Chapter 8 then takes a leap backward in time to explore how, exactly, the intricate link between development and governance was formed throughout the history of modern capitalism. The chapter is structured as a series of rapid-fire case studies in which each major wave of industrialisation is examined

in turn, with special detail paid to the gradual scaling-up of state power in each subsequent developmental boom – usually in reaction to working-class mobilisation. Of particular importance is the story of the US and its 'American System' of manufacturing, which serves as the first case of what would later come to be known as the 'developmental state.' The chapter then proceeds through latter-day examples in Japan, Taiwan, and elsewhere.

Chapter 9 brings the narrative back into the present-day by examining the middling outcome of similar developmental drives in Thailand, the persistence of rural poverty and informal employment, and the political consequences. In particular, the chapter explores how the Asian Financial Crisis and subsequent rise of Chinese industry structured the popular protests, coups, and countercoups that followed the turn of the millennium, peaking in the red shirt occupation of Bangkok in 2010. The question of how and why political struggle tends to take on this 'populist' character is a central theme, with mythic images of development and agrarian life deployed alongside and against one another in the political consciousness absent any communist horizon.

Chapter 10 then pivots across the Indian Ocean to East Africa, examining the extraverted nature of urban development in Tanzania's largest city, Dar es Salaam, where streams of new migrants from the countryside find themselves in an urban environment built to meet the needs of distant real estate and mining interests. It offers a quick history of how colonial regimes encoded racial divides into the built environment and how these divides have today persisted and reorganised themselves along lines of class and formal versus informal settlement and employment. The chapter also explores the new chains of finance and construction contracting emanating from Asia, dispelling common myths about 'China in Africa' and illustrating the more complex reality beneath the 'Belt and Road.'

Chapter 11 then elaborates the political and theoretical implications of these structural trends, pointing to the uprising of the young, informalized proletarians in Kenya in 2024, reviewing the history of developmental debates in postcolonial intellectual centres such as the University of Dar es Salaam, and examining the value basis of 'premature deindustrialisation' today. Finally, **Chapter 12** offers a grim conclusion, analysing the rise in armed conflict, the general intuition of imminent societal collapse, and the integration of modern supply chains with civil wars and mercenary battles in places like Sudan and the Democratic Republic of the Congo. In particular, the chapter explores the specific organisational forms adopted by proletarians during the Sudanese revolution and the more general question of collapse, crisis, and the breakdown of the capitalist system, unifying the structural and subjective themes explored throughout.

Readers looking only for the ***core theoretical considerations*** should skim the **Introduction**, **Chapter 1**, and **Chapter 3**, and then read **Chapter 2**, and **Chapter 4** in detail. **Chapter 5** and **Chapter 6** may or may not add useful clarification, depending on the specific points of interest. The reader can then skip to **Chapter 11** and **Chapter 12**, both of which can be skimmed. The other chapters can be skipped.

Those hoping for ***a traditional 'political-economic' account*** will doubtlessly be disappointed. They can nonetheless find interesting material in the middle of the **Introduction**, in **Chapter 1**, **Chapter 3**, **Chapter 6**, and, above all, **Chapter 8**. In some cases, such as **Chapter 9** and **Chapter 11**, the political-economic sections can be pieced out of the whole. As a general rule, any chapter with a good number of charts will be of interest to readers of this orientation.

Anyone seeking material on ***political philosophy and specific accounts of class struggle*** will be most interested in **Chapter 7**, **Chapter 9**, and **Chapter 12**. However, the sections on the labour movement in **Chapter 3** will also prove useful, as will the general overviews of labour struggles in the history of development described in **Chapter 8**. Similarly, **Chapter 1**, **Chapter 5**, and **Chapter 11** also offer brief descriptions of class conflict that may be of interest.

The esoteric chapters in the first half of the book will pose a particular difficulty for many readers and those who find these theoretical considerations to be superfluous and would instead like ***a straight-to-the-point text about political economy and politics*** may simply prefer to begin with the **Introduction** and then skip straight to the second half of the book, reading from **Chapter 6** onward. Readers of this inclination may also be inclined to skip the more detailed appraisal of political subjectivity in **Chapter 7** and the overview of development theories in **Chapter 11**. In fact, the best exoteric reading of the text proceeds in this order: starting with the **Introduction** then moving immediately to **Chapter 8**, then **Chapter 6**, **Chapter 9**, and, finally, **Chapter 10** and **Chapter 12**. This is, almost certainly, the most spiritually impoverished of the options.

Any of these partial readings will garner only partial results and may, in certain cases, lead to severe misinterpretations of key points – in particular, concepts that are sometimes presented in mundane form (as 'alienated appearances') on the understanding that their deeper structure is elucidated elsewhere. While such piecemeal readings may be a necessary step for those first approaching such topics and while I have sought to present these ideas in an accessible and aesthetically pleasing fashion, this is ultimately not a beginner-level text and should in no way be treated as one. It can, nonetheless, be worked through by anyone with a reasonable grasp of the English language and the willpower suffer through it, regardless of how familiar they are with the field. Those

who seek to take on the full burden of the text and pass through each torture in its entirety may simply enter here, where they need heed no instruction aside from the old one inscribed in the gate beneath the page:

PER ME SI VA NE LA CITTÀ DOLENTE,
PER ME SI VA NE L'ETTERNO DOLORE,
PER ME SI VA TRA LA PERDUTA GENTE.

Descent

When the humidity is right, the mist rises from the sprinklers in the sprayfields like a spirit from the fragrant soil of a grave. When the wind is right, the spectre drifts, draping its diaphanous glimmer over the rust-speckled metal of broke-down trucks and the rotten vinyl siding of houses slouching with an inward emptiness, as if the structures themselves had been hollowed of hope. When the heat is right, the ghost melts into a slick grease that glistens red-brown, often opalescent. When the season is right, it sinks into carefully gridded fields, where it quickens the cash crops that supplanted the longleaf flatwoods and wet pine savannah and slowly plundered the rich soil of the upper coastal plain. When the weather is right, the mist is washed from the air by the rain, which carries it into the rivers and then the aquifers below, where it sits and rules like a bloated corpse on its dripping, lightless throne. Though seemingly immaterial, the mist is nonetheless a substance. Its suspended particulate matter is siphoned into the lungs and the kidneys of those who live in it. It is tasted on the tongue, kneaded into the tear ducts. It settles into scratches in the skin where it persists as a dull redness. Wounds stay open longer here. Everyone seems to wheeze. The eyes, nose, and throat suffer constant infection. The people of the coastal plain inhabit the substance of the spirit and, in exchange, the substance abides in their bodies. Stay long enough and you, too, will become a temple to the mist.

What, then, is the mist? In mundane terms, it is liquefied hog manure – more accurately, an 'effluent' that is not simply faeces but a sludge of shit, blood, piss and miscellaneous bodily fluids swimming with growth hormones, all turned a brownish pink by anaerobic bacteria – which is piped out of massive open-air waste lagoons at nearby factory farms and sprayed untreated onto local fields as a cheap source of 'organic' fertiliser in poor rural areas such as Bladen County, North Carolina. The coastal plain of the US Southeast was, in a way, the birthplace of the factory farm as we know it today. Though visible as early as the 1960s in the emergence of an industrialised broiler chicken supply chain, some of the first concentrated animal feeding operations (CAFOs) in the pork industry were then piloted by Smithfield, headquartered in nearby Virginia, in the 1980s. The CAFO model was both a technical transformation in how animals were raised, slaughtered, and processed, and a form of corporate reorganisation allowing a small handful of firms to rigorously monopolise the sector. Packers like Smithfield bought up direct competitors, acquired their own feedlot

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facilities, and instituted a contract farming system encouraging greater concentration among the suppliers not acquired outright. In much the same way that the emergence of big box retailers would decimate small town general stores, the birth of the factory-style feedlot ensured the effective extinction of the small-scale family farm within mainstream pork production. This then induced an extensive transformation of the rural landscape, delinking field from feedlot and concentrating labour and environmental hazards in increasingly integrated complexes that combined animal housing facilities, slaughterhouses, and packing plants. In a broader sense, then, the mist represents the hyper-industrialisation of agriculture and the conversion of rural hinterlands into technical outposts and sacrifice zones for the most abject forms of production.

But the mist is also more than this. After all, the ongoing industrialisation of agriculture extended well beyond the meat processing sector. In North America, this was mostly experienced as a regional shift. While hog production increased rapidly in states like North Carolina – with an even more aggressive concentration underway in the poultry business in Alabama, Georgia, and Arkansas – the expansive livestock corridors that once defined the Midwest were increasingly concentrated into a handful of production hubs centred on places like Sioux County, Iowa. Meanwhile, the earlier patchwork of family farms was either bought or contracted out to major agricultural combines, further concentrating land ownership and converting the mosaic of livestock and cash crops into an ocean of monoculture grain (namely maize and soy) destined for the feedlot. In this way, even counties without a meatpacking industry were made dependent on this constellation of factory farms, mediated by the equally monopolised global grain markets. In areas 'lucky' enough to host these growing factory farms, larger and larger shares of the local population would be made subject to the brutal labour conditions that prevail within such plants, not to mention the horrific health impacts of living in close proximity to them.

By the turn of the century, 'the dominant system of agriculture across the temperate world' had thereby come to resemble 'islands of concentrated livestock within seas of grain and oilseed monocultures, with soaring populations of a few livestock species reared in high densities, disarticulated from surrounding fields.'[1] In the decades that followed, the pattern then spread to less temperate climes. In places like Brazil, the Ivory Coast, and Indonesia, some of the world's last large rainforests were eaten away by expanding plantations produ-

1 Weis 2013, p. 8.

cing cash crops, biofuels, and feedstocks for industrial use. China emerged as a major consumer of all three, creating a 'transcontinental political-economic and metabolic matrix' of capitalist agriculture expressed through 'new North-South and South-South interregional commercial relations in which feed crops and flex crops such as soybeans, corn, and palm oil are produced, circulated, and channeled into industrial operations.'[2]

In much the same way that modern manufacturing facilities rely on an extensive network of supply chains that channel labour, energy, and raw materials from every corner of the planet, the density of factory farms is only enabled through an expansive substrate of supporting biomass. This results in a functional zoning between two forms of agro-industrial space: geographically concentrated factory-style meat processing facilities employing thousands of workers across a handful of acres, versus geographically expansive monocultures of high-energy feed crops, employing a handful of workers across thousands of acres. In the broadest terms, the mist therefore represents a massive reconfiguration of the human metabolism with the non-human world and a restructuring of the imperial hierarchy through which this metabolism is organised. But why does the mist haunt this place in particular? On the one hand, we can find a simple geographic explanation: the poor counties of the Carolina coastal plain are the proximate hinterland to some of the largest and fastest growing population centres in the country. In North Carolina, population density forms a sickle running roughly along I–85 from Charlotte to Raleigh, both of which are regularly ranked among the fastest growing American cities. To the west of the urban crescent lies Appalachia, and to the south and east an agrarian hinterland of sandhills rolling slowly downward from the plateau toward the coastal plain, where hogs outnumber people roughly thirty-five to one and the average census tract has seen poverty increase every decade since the 1980s.[3] The crescent itself is (after Atlanta) the second-largest urban corridor in the larger Piedmont-Atlantic Megaregion, an emerging megalopolis stretching from Birmingham, Alabama through Northern Georgia and then curving north across the Carolinas. In addition to serving as the fastest growing population centre in the country since the turn of the century, the Piedmont-Atlantic has also joined Texas to become one of the centres of the so-called 'reindustrialisation' of the US South, driven by an influx of new manufacturing

2 Ghosh et al. 2022, p. 151.

3 For example, Census Tract 14 of Cumberland County, a major hog production centre just east of Fayetteville, had a poverty rate of slightly more than 19 percent in 1980, rising to slightly more than 30 percent by 2018, according to official census measures.

and warehousing facilities funded, in part, by foreign direct investment (FDI) from emerging blocs of capital in what was once the Global South.

The current distribution of factory farms in the region also overlaps almost perfectly with maps showing the share of the population that was enslaved in the years prior to the Civil War. After emancipation, the warm climate and soft soil of the coastal plain remained, as did much of the population, who were already trained in farm skills and the myriad arts of rural subsistence. Thus, the old plantations were converted into plots to be contracted out to sharecroppers. Both Smithfield, Virginia and Tar Heel, North Carolina, where Smithfield runs the largest hog CAFO on the planet – capable of slaughtering thirty-six thousand pigs a day and serving as the largest employer in the county, with more than five thousand workers – are located well within the old plantation belt. Today, the coastal plain is still host to North Carolina's largest shares of black ruralites, and black workers are one of the meat processing industry's two main labour pools, alongside recent migrants from Latin America. Robeson County (near Tar Heel in Bladen County) also has the largest and most concentrated indigenous population on the East Coast and, for this reason, the area was subject to a tripartite system of segregation after the end of Reconstruction. The geographic layout of modern meat production thereby highlights long histories of race and poverty and actively reproduces these divides in the present. After all, the process of racialisation takes place through systematic and sustained exposure to elevated mortality and morbidity.[4] The hog farms of the Southeast have therefore become some of the most common case studies of environmental racism.[5] This is why the sacrificial management of the far hinterland often follows what philosopher Achille Mbembe refers to as a 'necropolitical' logic, in which it is not life that is administered but instead the distribution and deployment of death.[6] We might, then, even think of the mist as something

4 This follows the definition of racism used by geographer Ruth Wilson Gilmore, as 'the state-sanctioned and/or extralegal production and exploitation of group-differentiated vulnerability to premature death.' See Gilmore 2007, p. 247.

5 'Children who attend schools near CAFOs in North Carolina experience higher levels of asthma and wheezing compared to those who attend schools farther from CAFOs, and residents within one and a half miles of CAFOs report elevated blood pressure; eye, nose, and throat irritation; difficulty breathing; nausea; and chest tightness, problems that worsen as the odour worsens. One study found that eastern North Carolina residents who live near factory farms experience higher rates of asthma, anaemia, kidney disease, infant mortality, and infections compared to rural residents who don't live near CAFOs, even controlling for other factors like poverty.' (Berger, Jamie 1 April 2022 'How Black North Carolinians pay the price for the world's cheap bacon', *Vox*, https://www.vox.com/future-perfect/23003487/north-carolina-hog-pork-bacon-farms-environmental-racism-black-residents-pollution-meat-industry)

6 Mbembe 2019.

like racism, materialised. Not simply an abstract ghost haunting the land but instead the particulate matter of a dark and violent history literally weighing on us in the present.

Yet the mist doesn't quite reach Fayetteville, an old plantation town that enjoyed its 'golden decade' in the 1780s, capped by the Fayetteville Convention, where the ratification of the US Constitution took place after the Federalists won the 1789 elections. Afterwards, however, the city's prominence receded, with the state capitol moved to Raleigh and Fayetteville settling into its role as a minor industrial hub and arbiter in the slave-labour system that fuelled the antebellum economy. When the war came, the city was razed by General Sherman and its rural hinterland fragmented into a dispersed system of mixed subsistence farming and sharecropping, providing a concise symbol for more general changes in the political economy of the South. The modest revival of the city then proved equally symbolic, with the federal government choosing an area just north of Fayetteville as the site for Fort Bragg toward the end of the First World War (its name since changed to Fort Liberty following widespread protests against remnants of Confederate influence), thereby converting the disgraced not-quite-capitol of the Atlantic slave belt into a provincial military outpost.

After the Second World War, the scale of military activity at the base grew rapidly, with Fort Bragg and neighbouring Pope Airforce Base (now Pope Field) taking on increasingly central roles in projecting US power across the globe. By the turn of the century, the Fort had become the largest single military base in the world, as measured by its population, with more than fifty thousand military personnel, more than ten thousand civilian employees, and more than twenty thousand military family members, all living and working in and around a city with a population of a mere two hundred thousand. According to the US Army itself, 'almost 10 percent of all army forces' are assigned to the base.[7] The Department of Defense remains the city's largest employer, the local government offers lucrative welfare programs for soldiers and veterans, and essentially every other industry in the city is dependent directly or indirectly on the fort and its affiliates.

In a way, this military-industrial outpost is itself a mirror of the agro-industrial constellation to the East. Not only have rural counties in Southern states long contributed a disproportionate share of the country's soldiers, but the basic geography of defence infrastructure also echoes that of factory farming, with

7 12 May 2023 'Visitor Information: Welcome to Fort Liberty', *U.S. Army*. https://home.army.mil/liberty/about/visitor-information

its dense installations buoyed by expansive logistical systems for food provisioning. The Army & Airforce Exchange Service (AAFES) is the most obvious example, operating more than four thousand facilities in all fifty states and more than thirty countries, where it provides food and retail services to military personnel via franchise relationships with major corporations. This is, for example, how Burger Kings are present on more than a hundred military installations throughout the world and why the US Air Force has the ability to deploy a fully functional containerised Burger King to any land-based theatre of operations within 24 hours.[8]

But the relationship also runs in the opposite direction as well, with military imperatives conditioning industrialisation. In the US, continual wars of westward conquest across the continent created 'territorial geometries of rangeland, pasture, infrastructure and settlement [which] were undergirded by networks of fortified military positions that established *avant-garde* anchors for both decentralising and densifying population and industry.'[9] Though early experiments in canning and the mass production of military foodstuffs first took place during the Napoleonic Wars, it was the US Civil War that offered the first real 'opportunity for the large-scale implementation of military food preservation, coupling and capitalising on the rail-borne trade of ice first, and refrigerated foodstuffs later.'[10] In other words, the early industrial food system is what enabled Sherman's army to raze Fayetteville, just as the current military-industrial food system enables the rapid deployment and provisioning of the soldiers stationed at a Fort Liberty anywhere in the world within the space of a single day.

1 The Substance of Sin

There is thus a deep linkage between the agro-industrial complex in the coastal hinterland and the military-industrial outpost in Fayetteville. The former serves as the forefront of capitalist society's (genetic, energetic, ecological) subsumption of the non-human world, sculpting a planetary ecology better attuned to its peculiar form of social domination. And the latter is the tip of the spear of the most powerful military force in the history of the world – the first such force in human history with the capacity to snuff out the entire species as easily as one might slaughter a hog. If you ask certain people, then, they will simply say

8 Arroyo and Bélanger 2018, pp. 200–15.
9 Arroyo and Bélanger 2018, p. 201.
10 Arroyo and Bélanger 2018, p. 199.

that the mist is a curse. Perhaps this is the most concise description. We might think of it not merely as physical particles pumped from the waste lagoons to be sprayed over cash crops but also a sort of moral matter pumped up from the dark aquifers of history, tracing the course of our bloody present back into our bloody past and thereby binding us to both. The Jain religion holds, for example, that karma is not an abstraction but is instead a substance with two sides: first, *dravya karma*, which is an infinitesimal dirt – each Planck-length said to contain an infinity of karmic particles – that adheres to the soul and produces a secondary sequence of psycho-material effects experienced as emotion, called *bhava karma*. In the South, *dravya karma* would more simply be called 'sin.' And the mist operates through much the same karmic mechanism. After all, it is an accretion of social activity, which always has an ethical character. But its ethical calculus is also inverted. Rather than the cosmic justice allotted by karmic scales trending always back toward a state of pureness and balance, we find a darker metric more adequate to our broken world. The mist weighs not on those who profit from the ruin of life but instead on those ruined by it. The populations who were subject to the worst atrocities of the past are, in our world, the most likely to suffer the many atrocities yet to come. The rich are absolved, while the poor are left to sink in the very substance of sin.

Beginning in the 2010s, a neologism arose among young people to describe this basic condition: Hellworld. Initially a joke, the idea gained an increasingly grim undertone in the pop-apocalyptic atmosphere of what seemed to many a lost decade, defined by the perpetually stalled 'recovery' in the wake of the largest economic crisis since the Great Depression. In a resonant meditation on the death of a close friend, Harper Ferry sought to describe exactly what the term was meant to capture:

> it unified our problems into one coherent quagmire. Hellworld was cops. It was work. It was the advancing and all-consuming impossibility of joy on Earth. Hellworld is everyday life … Everyone is grieving, and everyone's emotional support network is also grieving, and no one has their shit together in the first place. Have you ever tried to touch bottom while you were swimming only to realise that the water had been deeper than you'd thought the whole time? The water that rushes into your nose and mouth while you try to breathe at that moment – that's Hellworld.[11]

11 Ferry 2017.

We might, therefore, think of the mist as the omnipresent, anti-karmic atmosphere of our fallen world, a sort of field of sin that binds together the many injustices into a single, evil presence. Ian Wright describes something similar, equating individual profit-seeking firms to 'autonomous control loops' in theories of cybernetics:

> … at the apex of the economy we have a competing collection of identical controllers – with an atatvistic, low level of demonic intelligence – which inject and withdraw a social substance that appears to possess the magical power of animation, of bringing things alive, of creation; but also appears to possess the power of annihilation, of suffocation, of bringing things to an end, of destruction.[12]

This intuition that capital somehow haunts the very fabric of society is nothing new. It is already visible in Marx's illustration of capital as 'alien mediator' and an 'entity outside man and above man' that then 'becomes a real God' as '[i]ts cult becomes an end in itself.'[13]

For Marx, these descriptions are not simply metaphors. As Wright argues, since capital as a whole can be understood to have 'its own goal state, sensory inputs, decision making, and ability to act upon the world in which it is embedded' it can therefore be described as 'a new kind of supra-individual control system' that takes on something like the character of a dark god:

> … speaking animistically, a spirit, or deity, indeed controls capitalism. This god can shatter itself, and appear at multiple times in multiple places. And it can combine with versions of itself, to aggregate into bigger and more powerful incarnations. It can possess humans, and control them, by forcing them to work, or forcing them to accumulate. This entity directs social activity by giving and withdrawing its magical substance, which we call value. We sacrifice ourselves to it, we appease it, and we hope it will favour us.[14]

Wright describes this spirit as an 'egregore,' a term derived from the apocryphal *Book of Enoch* and popularised by occultists in the early twentieth century to describe 'a non-physical entity that exists in virtue of the collective ritual

12 Wright 2020.
13 Marx 1975, pp. 211–28.
14 Wright 2020.

activities of a group yet operates autonomously, according to its own internal logic, to materially influence and control the group's activities.'[15] More than this, the demiurge that emerges from these rituals then reshapes the environment in which this ritual activity takes place: felling the forests, heating the atmosphere, garrotting the Earth in steel. This vast process can only be described as one of xenoformation, the dark impulses of accumulation resculpting the very crust of the planet into inhuman, inhospitable territories attuned to the endless circuit of capital hurtling through its feverish seasons. The thing that we conventionally call 'the economy' thereby takes on the characteristics of something like an eldritch horror, insensitive to the plight of humanity and possibly even incomprehensible to the human mind. To directly perceive 'capital,' as such, is to be annihilated in the mad threshing of its serrated flesh.

In France in the 1970s, communist thinker Jacques Camatte similarly described how 'the material community of capital' comes to displace the 'human community' insofar as the valorisation process (i.e. the purified sequence of money becoming more money via investment) dominates and grows increasingly divorced from the labour process and from essentially all other aspects of social life. 'Capital' in the abstract thereby comes to appear more and more as an autonomous, 'animated monster,' literally embodied in the built environment and attaining a dark apotheosis in the flow of arcane financial derivatives.[16] In a simple sense, the material community of capital described by Camatte is just the name for capitalist society and its material undercarriage. But it also designates something more, again: a supervening social logic formed through rituals of exchange. Marx's own description of capital as an 'automatic subject' thus takes on darker contours. Instead of an egregore, summoned into being through human practice, according to Camatte, the situation is reversed: 'the human being is dead and is no more than a ritual of capital.'[17] And capital itself is 'death-in-life, death with all the substance and power of life.'[18] In his later work, he therefore speaks of capital having 'domesticated' the human species, which is now subject at every imaginable level of material and psychic existence to the imperatives of valorisation, much as the lives and bodies of the thirty-some-thousand pigs killed every day in Tar Heel have been fundamentally reshaped by the dictates of profit and property in every respect, from

15 Ibid.
16 Camatte 2011, p. 231.
17 Camatte 1995, p. 109.
18 Camatte 1995, p. 109.

their overall lifecycle down to their most minute genetic information, which is literally the intellectual property of the company.[19] As the mist sinks into every orifice, who can say where exactly the substance of sin gives way to the skin?

2 The Smell of Money

Pork industry reps like to say that the omnipresent stench on the North Carolina coastal plain is the 'smell of money.' Corporate PR campaigns and local politicians stress the region's near-absolute dependence on the sector, casting it as a saving grace in the midst of the farm crisis of the 1980s (rather than a proximate cause of that very crisis) despite some of its unpleasant externalities. But only the poor are blessed with a beachside view of the waste lagoons and forced to breath the 'smell of money' every day, while the pork-pandering politicians and slaughterhouse executives live well beyond the veil of mist. And yet the phrase is nonetheless something of an adianoeta, carrying an ironic truth that swims in the subtleties beneath the surface. In fact, it would be difficult to find a more literal metaphor. According to Camatte, money is something like the constituent matter of capitalist society, knitting it together into a 'community-continuum' or a 'totality.'[20] This totality only ever appears to us partially, most often in the form of macroeconomic measures or occult acronyms flowing across the screens of central banks, treasuries, and stock markets. But these purified financial and fiscal representations are not simply the false appearance of some 'real' economy buried underneath. According to Camatte, interest-bearing capital 'is essential because it is with this form that capital, according to Marx, achieves totality.'[21] In a very literal sense, these concise mathematical measures of money *are* the body of the beast. After all, the tweaking of simple monetary management mechanisms such as the interest rate will have an obvious and expansive real-world impact. Similarly, any slowdown or reversal in the increase of GDP year-on-year generates a very real crisis that threatens the lives of those forced to bear its costs.

19 These later writings would go on to influence both the 'accelerationist' current within philosophy and the anarcho-primitivist movement. Camatte's earlier writings – especially his expositions on Marx's various unpublished manuscripts – have only recently been re-popularised within anglophone communist circles, largely via the influence of the so-called 'communization' current.

20 Camatte 2011, p. 245.

21 Ibid.

Since this book is, fundamentally, a horror story about capital, it must also be about money. Nonetheless, the mist is not simply money as some financial abstraction. It is also money as a substance, produced in a particular place by particular pigs, piped out by particular people, and poured into particular environments afflicted by a particular poverty. And this is a story built from personal experience in spaces draped in their own glimmering mist: failing farms where blood dropped into the dust gathers into small glittering jewels, kitchens where hot oil melds flesh to metal, sprawling logistics complexes warm with the thrashing of machines, ant-infested food stalls in the alleys of some industrial district. These are places where 'the economy' is not numbers scrolling on a screen but head of livestock streaming into the slaughterhouse, weight of grain poured like gold into the velvet darkness of the silo, the sharp *shing* of hotel pans sliding over chrome countertops, and counts of boxes and bundles hurtling down frayed conveyor belts into the cold bellies of container trucks, each ultimately accounted in hours of work choreographed to match the motions of great machines heaving beneath and beyond our bodies. This is a world built up around the commodity. Humankind is ancillary. We should therefore take the statement literally: the mist *is* money. In fact, the effluent burning acrid against the back of the throat, is, perhaps, the closest one can come to touching 'capital,' in the abstract.

This 'real God' often appears as a singular force commanded by a coherent logic. And yet, as Wright's imagery suggests, it also has a multitudinous or demonic character – a contradictory structure in which the whole is only cast into motion through the conflict of its parts. In this case, what appears to be a dark god ruling over humanity is ultimately revealed to be nothing more than a conflictual system of social domination in which one portion of humanity rules over another. And this rule is itself riven by fraternal rivalries that pit workers against each other in service of higher-order conflicts between different factions of capitalists, each expressing in its own way the logic of "capital" as such. The most important of these conflicts are the so-called "hegemonic" transitions. Younger, more dynamic layers of molten money are always forming deep in the belly of the planetary factory. The heat of accumulation that radiates from these fledgling sources of capital drives the growth of the system as a whole, generating new economic booms at the frontiers of factory production which are led by new cadre of capitalists vying for entry into the upper echelons of industry. But these emergent pools of capital also find themselves pushing up against the older, more ossified layers above, which press back down with the full force of their accumulated power. The release, absorption, or suppression of this molten pool of capital can then pose a larger crisis of hegemony within the prevailing distribution of power, expressed through trade wars, cata-

strophic economic crashes, and the gradual build-up of military conflict. It is, in essence, a battle over succession. If the ascendant force is suppressed, the stable upper layers cast the crisis backward against the upwelling force, which hardens and fragments – but, in so doing, these upper layers often accelerate their own decay and help to gestate new challengers even further afield. If successful, the eruption then spreads the power of this ascendant fraction of capital over the surface of the economy, which settles into a new stability.

The pork industry on the coastal plain again serves as a succinct symbol, demonstrating both the banalities of day-to-day competition and the larger-scale fissures building up in the structure of global power. Smithfield was founded in the town of the same name in Virginia, just south of Jamestown, in the latter years of the Great Depression. The company is precisely the sort of white patrilineal family business beloved in autobiographies of American capitalism: founded by father and son Joseph Luter Sr. and Joseph Luter Jr in 1936, the firm began as nothing more than a small shed for curing ham, with the pair purchasing hogs from a local supplier and processing roughly fifteen a day by hand for sale to local stores in the area. The hogs were largely obtained from small-scale farms in immediate hinterland, which was defined by a mixture of sharecropping and family farming. As in any account of entrepreneurial success, however, the invisible hand of the state was central to the company's early growth. It was only the stimulus of World War II and related support for key industries in the food supply system that then allowed the Luters to open their first meatpacking plant in 1946, slaughtering around 300 hogs a day.[22]

By the end of the 1950s, the plant had grown even further, employing hundreds of workers and processing thousands of hogs.[23] Then, in 1962, Joseph Luter Jr. died, passing control of the firm onto his 26-year-old son, Joseph Luter III. A six-foot-two, two-hundred-fifty-pound white man from Virginia with his gaze perpetually hidden under black aviators, Luter III was nearly the perfect portrait of US postwar hegemony. He would later gain an outsized reputation within the corporate world for his aggressive acquisitions of weak firms, his uncanny business acumen, and his expensive tastes, with second homes on Park Avenue in Manhattan and in Aspen, Colorado. He would also come to be known for uncouth comments in response to criticisms from animal rights, labour, and environmental groups, which often turned into rants against 'neur-

22 Ernsberger Jr., Richard 25 September 2009 'The Ham Man', *Virginia Living*. https://www.virginialiving.com/culture/the-ham-man/

23 Waltz 2018, p. 11.

otic' vegetarians trying to impose their views on America.[24] Nonetheless, under his tenure, the company achieved an average 24 percent rate of return on its equity, consistently outperforming the S&P 500.[25] Today, a towering, life-size bronze statue of Luter III stands in front of the company's riverfront offices in Smithfield, next to similar statues of Luter Jr and Luter Sr, cementing the presence of the corporate giant and bolstering the mythos of patrilineal succession that sits behind it.

Luter III also became something like the father of factory farming in the sector, leading the company through a long period of ruthless corporate and technical restructuring of pork supply chains that effectively sawed out a central place for the firm in an increasingly monopolised sector. In the 1980s, the company initiated a sequence of aggressive lateral acquisitions and, beginning in the 1990s, it consolidated these new holdings and moved down the value chain from packer to producer. The farm crisis of the 1980s had already bankrupted smaller family farms throughout the country and had hit especially hard in the Midwest, leaving the field open for the emergence of new monopolies rooted in a new geography of production.[26] By 2006, Smithfield, Tyson, Swift & Company, and Cargill were together responsible for more than 70 percent of domestic pork production.[27] The process of vertical integration was also visible in the production process itself. Inspired by the example already set in the poultry industry, Luter III led the company through a series of experiments that would ultimately result in the emergence of the modern CAFO system.[28] The Tar Heel facility was founded in 1992 and, by the year 2000, it had the capacity to process 32,000 hogs a day. Soon, waste lagoons congealed across the coastal plain and the mist rose like a fog over the stricken land. By the middle of the decade, pigs outnumbered people. Around the same time, Luter III began to prepare for his retirement, stepping back into the role of non-executive chairman in 2006 while his son, Joseph Luter IV, ascended the corporate ladder.

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24 Kesmodel, David 5 June 2013 'Smithfield: How Sausage was Made,' *The Wall Street Journal*. https://www.wsj.com/articles/SB10001424127887324069104578527380307819620

25 McWilliams, Jeremiah 16 June 2006 'Joe Luter III to step down as Smithfield Foods' CEO', *The Virginian-Pilot*. https://www.pilotonline.com/2006/06/16/joe-luter-iii-to-step-down-as-smithfield-foods-ceo/

26 Miller, Dale 1 May 2000 'Straight Talk From Smithfield's Joe Luter', *National Hog Farmer*. https://www.nationalhogfarmer.com/mag/farming_straight_talk_smithfields

27 Calamuci 2008, p. 73.

28 Tietz, Jeff 14 December 2006 'Boss Hog: The Dark Side of America's Top Pork Producer,' *Rolling Stone*. http://www.rollingstone.com/culture/news/boss-hog-the-dark-side-of-americas-top-pork-producer-20061214

Though everyone assumed the succession would proceed as planned, sometime between 9/11 and the bursting of the real estate bubble, Luter III seems to have had a crisis of faith. Not only was he apparently less and less confident that his son could steer the firm through the hard times to come, he also began to look upon the prospects of the pork industry in the US with increasing pessimism. He made remarks in interviews bemoaning the declining sales of country ham, blamed on an array of factors ranging from their salt content, to people opting for more chicken, seafood, and soy, to the ideological influence of vegetarians and environmentalists. In these interviews, Luter III noted that 'the animal-rights people want to impose a vegetarian society on the U.S.' all while expressing nostalgia for the good old days 'when people were less concerned about caloric intake and cholesterol and everything else.'[29] In the same interviews, Luter III often threw in selective praise for the ascent of China and its pork-loving consumers. He had even arranged a meeting with a major Chinese businessman in his Manhattan apartment in 2006, proposing the idea of a joint venture.[30]

In retrospect, it now appears that he was not simply making errant comments but also expressing a more general sentiment about the weakening of the American spirit, as contrasted to the ascent of Chinese industry: reading the steady decline of US hegemony in the annual sales of Christmas hams. And his intuition soon seemed to be borne out by the devastating impact of the Great Recession, which threw US corporations into disarray while China appeared mostly unaffected. Luter IV became executive vice president of the firm in 2008, just as profits plummeted and the company found itself overleveraged from previous decades of expansion. Rising prices for key inputs like grain further narrowed margins, and Smithfield reported a 190.3 million USD loss for the 2009 fiscal year, shuttering six plants and eliminating some 1,800 jobs. Similar crises were playing out across essentially all the country's major conglomerates, from General Electric to General Motors. The very pillars of the American Dream seemed to be crumbling into the fetid marshes from which they emerged. And, in the ensuing tumult, the succession of the great pork dynasty was disrupted and the company never passed into the hands of its fourth scion.

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29 Kesmodel 2013; Sauers, Elisha 10 September 2016 'Former Smithfield Foods exec wants piece of the wedding business', *The Virginian-Pilot*. https://www.pilotonline.com/2016/09/10/former-smithfield-foods-exec-wants-piece-of-the-wedding-business/; See also: Ernsberger 2009.

30 Kesmodel 2013.

3 Succession

Instead, Smithfield was sold outright in 2013 to the Chinese businessman Luter III had met with in 2006, Wan Long, head of WH Group (at the time Shuanghui), which is now the world's largest pork producer. If the Luter dynasty offers an idealised portrait of American capitalism, the Wan family is something like its mirror image reflected from the Chinese heartland. Born in the agricultural city of Luohe, Henan, in 1940, Wan Long's youth spanned the tumultuous decades of civil war and revolution, the golden age of postwar prosperity in the 1950s, and the increasing ossification of the socialist experiment over the subsequent decades. After a brief career in the military, Wan returned home to Luohe to work at a cold-storage facility that had just been converted into a pork processing factory by the local government, holding various positions in the plant until he was elected factory director in 1984. Even though private ownership would not be fully legalised until the subsequent decade, early reforms had begun to see many small- and medium-sized enterprises and local industrial ministries slowly transformed into *de facto* private companies, with their managerial strata later transformed into legal shareholders. Agriculture was a particularly dynamic sector. Output skyrocketed as reforms allowed ruralites to engage in the sideline production of cash crops, new green revolution technologies were made widely available, and quasi-private firms arose to perform activities like agroprocessing.[31] And Luohe was particularly well-positioned to benefit from the agricultural boom, since it sits at the very centre of China's Central Plain, the storied origin-point of Chinese civilisation and long the agrarian heart of the country.

Under Wan's leadership, the factory began to upgrade its equipment and reform its internal command structure, all while crafting an identifiable brand to stimulate sales within a rapidly growing domestic market. After launching its first line of name-brand sausages in 1992, the enterprise was able to use its retained profits to expand the business and attract international investment, establishing the Shuanghui Group (in 1994) as a joint venture between the local government and investors from six countries.[32] Throughout the remainder of the decade, the new firm opened a series of plants and secured new streams of investment, listing on the Shenzhen Stock Exchange in 1998. By the early 2000s, the company had fully modernised its processing lines in Luohe and had estab-

31 For the textbook overview, see: Naughton 2018, pp. 307–28.

32 Nikkei 2023 'WH Group Ltd., HK', *Nikkei Asia*. https://asia.nikkei.com/Companies/WH-Group-Ltd.-HK

lished packaged meat production sites up and down China's coastline, giving it ready access to the enormous markets emerging in what were at the time the largest and fastest growing cities the world had ever seen. It also began to look outward. After China's accession to the WTO in 2001, Shuanghui immediately increased the share of its production devoted to exports and entered into a series of new joint projects with major foreign multinationals such as Japanese firm Nippon Ham and US chemical company DuPont.[33] Shuanghui Group was then corporatised through a negotiated buyout in 2006 orchestrated by Wan and his affiliates, who successfully courted outside investors – namely Goldman Sachs, Beijing-based asset management firm CDH Investments, Singaporean state holding company Temasek, and the private equity firm New Horizons, founded by the son of former premiere Wen Jiabao – to buy out the shares of the old joint venture still owned by the city government, leaving Wan and his managerial team in control of running day-to-day operations. In exchange, Wan had promised the investors that, once fully privatised, the firm would be able to grow into the largest pork producer in China and see its profitability skyrocket.[34]

It was a good deal for all involved. These were the pre-crisis years, when US capital was still flush with cash and China's annual average growth was hovering around ten percent, with no end in sight. Some were already talking about the prospect of China becoming the next major hegemonic challenger, drawing on themes similar to those used to describe Japan in the 1980s. In 2004, corporate advisor Joshua Cooper Ramo, current chairman of the think tank founded by Henry Kissinger, began to warn that an ascendant China was set to disrupt the international economic order helmed by the US.[35] In the same years, figures such as Robert Rubin – Treasury Secretary under Clinton and head of several prominent DC think tanks – raised alarms over the potential security threat of a US budget deficit funded largely by Chinese purchases of Treasury bonds.[36]

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33 Flannery, Russel 10 June 2002 'Run Silent, Run Deep', *Forbes*. https://www.forbes.com/global/2002/0610/028.html?sh=631e01bc5af2

34 Shen Jiaping [申佳平] 19 December 2018 'Shuanghui's Navigator, Wan Long: Thirty Years of Legendary Development, Creating a World-Renowned Domestic Brand' [双汇领航者 万隆：三十载铸就发展传奇 打造国际化民族品牌], People.cn [人民网]. http://industry.people.com.cn/n1/2018/1219/c413883-30475530.html; Barboza, David, 2 June 2013 'Chinese Bid for U.S. Pork Had Links to Wall Street', *The New York Times*. https://www.nytimes.com/2013/06/03/business/global/behind-the-chinese-bid-for-smithfield-foods.html

35 Ramo 2004.

36 Tooze 2018, pp. 25–41.

Similar positions were echoed from the left as well, with Marxist geographer David Harvey arguing that 'the net drain of wealth from East to West that had prevailed for over two centuries has been reversed as East Asia in particular has risen to prominence as a powerhouse in the global economy.'[37] Meanwhile, world-systems theorists such as Giovanni Arrighi and Li Minqi both pointed to the boom in China as evidence that the global economy's centre of gravity was not only shifting toward Asia but also that this shift might instigate a fundamental transformation of capitalism itself or even its demise. Others saw in China the ascent of a distinct form of 'state capitalism,' set to displace the current 'neoliberal' norm represented by the US.[38]

In other words, there has long been a fundamental consistency between the right-wing image of a rising Chinese threat and the ostensibly left-wing hope that an ascendant China might be capable of somehow breaking the international economic order. As Ramo notes, Kissinger himself famously agreed with the central premise of world-systems theory, which states that every century or so sees the emergence of a new great power. Thus, Arrighi and Ramo alike claim that China is set to become the next hegemon, representing an 'East Asian-centred world-market society' distinct from and even contrary to the 'capitalist world-economy.'[39] At the geopolitical level, this manifests as an emergent and multipolar 'Beijing Consensus' set to overtake the 'Washington Consensus' that prevailed in the latter twentieth century.[40] Similarly, according to both authors, this new emerging market force is defined by forms of heavily networked commerce conducted through intricate and often personalised subcontracting relationships capable of knitting together the economic activities of many small firms, enabling previously unprecedented levels of complexity. For Arrighi, China's rise thereby represents a new, humanised form of non-capitalist market economy. Ramo saw in the same phenomenon the potential rejuvenation of liberalism.

In contrast, Li offers a more pessimistic view, arguing that China's rise is unlikely to rejuvenate capitalism or to inaugurate a novel form of market society. Instead, the ascent of Chinese industry seems poised to worsen a 'structural crisis of the existing world-system' that began as early as the 1970s, when

37 Harvey 2014, p. 170.

38 For example, see the theme issue of *Environment and Planning A* on the topic, ed. Ilias Alami, Adam D Dixon, Heather Whiteside and Jamie Peck (vol. 55, issue 3, May 2023). The term has also been adopted by think tanks such as the Centre for Strategic and International Studies.

39 Arrighi 2007, p. 7.

40 Ramo 2004.

declining industrial profits in the advanced economies inaugurated a long process of hegemonic decay that was then unveiled all at once in the spectacular collapse of the US financial sector in the 2008 Great Recession. Initially, the crisis of the 1970s was seemingly resolved 'through successive geographical expansions which incorporated new supplies of cheap labour.'[41] But, as Harvey has argued, these 'spatial fixes' to the problem of profitability are ultimately temporary.[42] For Li, however, the relocation of production to Asia was not only a conventional spatial fix but also a sort of threshold event in the history of capitalism. As early as 2008, Li claimed that 'world-wide proletarianization has reached an advanced stage,' beyond which subsequent spatial fixes will become difficult or impossible. The reason offered was essentially demographic. Since economic expansion in China and India is set to absorb the majority of the world's remaining stock of cheap labour, these formerly peripheral locations will thereby be elevated into 'semi-peripheries' in the global imperial hierarchy. But the scale of the phenomenon suggests that the 'semi-periphery will become a geopolitical bloc that includes the world's majority population as well as the bulk of the world's economic output' even while it remains excluded from the 'core.' Since the pyramid of imperial power is (for Li and others in this tradition) premised on the transfer of artificially cheapened labour and resources from periphery to core via unequal exchange, the fattening of the middle tiers of the world-system will whittle away the base of the pyramid, shrinking the periphery, siphoning more of this surplus into the semi-periphery, and thereby breaking down the basic structure of the world-system.[43]

Li's concern is echoed by military theorists such as David Kilcullen, who warned in the years leading up to 2020 that the simultaneous ascent and exclusion of 'the Rest' from 'the West' threatens 'the return of great-power military confrontation,' accompanied by 'the convergence of state and nonstate adversaries on remarkably similar operating methods despite their radically different points of origin.'[44] The expanding size and increasing frequency of military conflicts over the course of the subsequent decade seems only to have underlined these fears, with the grim spectre of worldwide warfare slowly rising over the ruins of Gaza and Mariupol. For Li, though, the relevant dynamics are economic and ecological, rather than geopolitical. Even though 'the long-term historical trend towards widening disparity between the core and peri-

41 Li 2008, pp. 175–76.
42 Harvey 1982, Chapter 13.
43 Li 2008, p. 176.
44 Kilcullen 2020, p. 1.

phery has been reversed,' a new core is unable to reconstitute itself by allowing ascendant nations entry into the upper rungs of the global hierarchy, as it has in the past.[45] According to Li, in the last cycles of expansion, this included countries such as Italy, Japan and South Korea. But the sheer size of China and India and the worsening of the global environmental crisis ensures that this pattern cannot be so easily repeated today. We have therefore already entered into a long period of turbulence and decline beginning sometime in the 2010s and, in Li's estimation, lasting at least until the 2050s. In this period, we can expect geopolitical conflict to increase, inequality within countries to rise (even as the gap between core and periphery narrows), new forms of authoritarian governance to emerge, and ecological collapse to intensify. Li sees in this the possible resurgence of socialism, but only as one sliver of light cutting through darker alternatives, such as a general collapse of the world-system and/or the emergence of new forms of feudal control.

Despite otherwise substantial differences, the key transformation being used as evidence in all these accounts is the relocation of manufacturing out of Europe and North America and into countries that were once peripheral to production, particularly in Asia.[46] Since manufacturing employment tends to drive wage growth, the rollout of new manufacturing lines in places that previously had low levels of industrial employment serves as the developmental force behind the convergence in incomes that Li documents, causing the wealthy countries' share of global GDP to peak around the year 2000 and decline thereafter.[47] Though seeded in earlier industrial booms in places like Japan, South Korea, and Taiwan, the last three decades have seen China play the central role in this process. By 2010, the total output of Chinese manufacturing overtook that of the US and, in 2012, that of the EU. As a share of the world total, the Chinese contribution had risen from almost nothing in the 1980s, to just under 14 percent in 2004 (the first year for which reliable data is available), and then to 31.8 percent in 2022. By comparison, the US and EU had each contributed roughly 25 percent of global manufacturing output in 2001. By

45 Li 2018, p. 75.

46 Kilcullen also identifies a concurrent trend tracing back through the Cold War, in which post-Soviet economic collapses left behind bloated military apparatuses that could then be mobilised for various forms of rentier plunder. In Russia, the fusion of these remnant military capacities with new extractive interests rooted in the oil and gas industries created a political apparatus only able to survive through the aggressive assertion of its extractive interests throughout its regional sphere of influence, leading to a series of more and more intense policing actions throughout the region, up to the invasion of Ukraine.

47 Li 2018, p. 75.

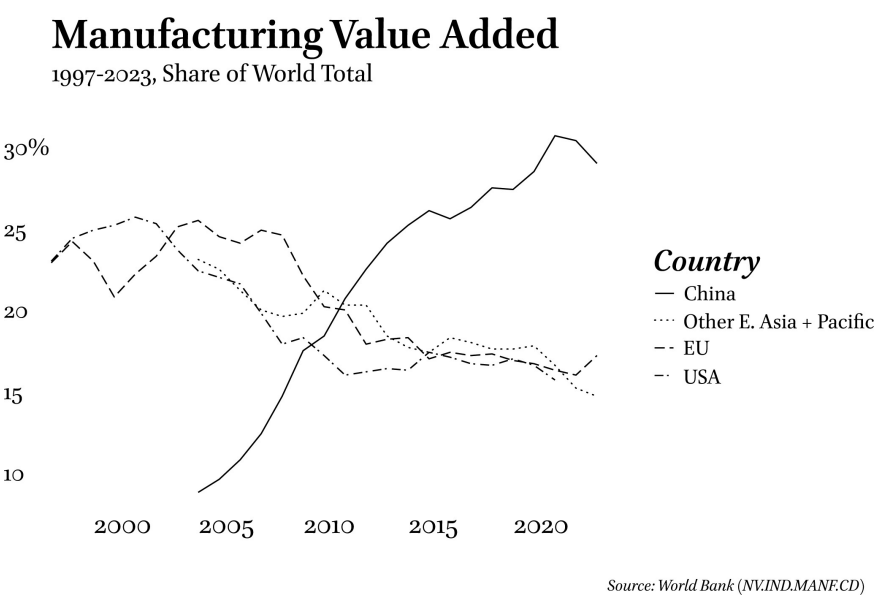

FIGURE 1 Manufacturing value-added, share of world total

2021 (the last year for which US data is available), this figure had declined to around 16 percent for both, essentially inverting the relationship (see Figure 1). The rapid growth in manufacturing output in China has also been the major cause of the global decline in poverty and inter-country inequality observed after the turn of the century – and China's slowing growth rate in the 2020s is now among the major reasons why this trend has reversed. Altogether, the rise in Chinese incomes 'accounted for almost 75 percent of the global reduction in the number of people living in extreme poverty' from roughly 1980 onward.[48]

Wan Long struck his deal with the consortium of investors somewhere in the middle of this process and his promise of windfall profits quickly bore out. Subsequent years saw each of the outside firms that had invested in the newly corporatised Shuanghui sell off their shares at elevated prices, bringing in exorbitant returns. By the time of the Smithfield acquisition in 2013, Goldman Sachs only owned some five percent of the company, down from nearly a

48 World Bank and DRC 2022 'Four Decades of Poverty Reduction in China: Drivers, Insights for the World, and the Way Ahead', *World Bank Group and Development Research Centre of the State Council, the People's Republic of China*, p. ix https://openknowledge.worldbank.org/server/api/core/bitstreams/e9a5bc3c-718d-57d8-9558-ce325407f737/content.

third in 2006.[49] Most of these shares were sold to Wan Long, his elder son Wan Hongjian, and his younger son Wan Hongwei, alongside a number of closely affiliated executives in what was effectively a management buy-out conducted through a series of shell companies headquartered in tax havens such as the Cayman Islands. The process was more or less completed when Shuanghui was renamed WH Group and launched an IPO on the Hong Kong Stock Exchange in 2014, one year after the Smithfield acquisition. Though now publicly traded, the majority of shares remained in the ownership of companies controlled mostly by Wan himself, alongside his two sons and the other members of upper management – now including a handful of token American executives. The consolidation of power was followed by several years of record profits, with the stock price of WH Group doubling between 2016 and 2018. But a series of crises then struck toward the end of the decade, beginning with the African Swine Fever outbreak in 2018–19, followed by the COVID-19 pandemic in 2020, and then capped by a succession crisis in 2021. Though this latter crisis loosely mirrored the one that occurred within Smithfield, it was also more explosive, and its outcome more ambiguous.

For many years, Wan Long had suggested that his eldest son, Wan Hongjian, would inherit control of the firm after his retirement. But the two had also suffered a long-running disagreement about the future of the company. In a way, their disagreement symbolised the divergent expectations of their two generations. Wan Long had been raised in extreme poverty, worked menial jobs through much of the socialist era, and, once marketisation began in earnest, had catapulted his company to success through a cunning combination of ruthlessness, lucrative connections, and good business sense. Like many others in his generation, he had built his fortune with help from both leading bureaucrats and international investors, and he saw the future of China as one of increased opening and gradual convergence with the West. He had sought out the Smithfield acquisition not to gain access to the US as an export market for Chinese pork production but instead to acquire lucrative intellectual property and to facilitate the import of US pork into China, where he expected that rising incomes would lead to increased demand for higher-quality American breakfast meats. In contrast, Wan Hongjian was born into relative wealth and entered the family business just as Chinese companies were beginning to make a name for themselves on the global stage but were also finding themselves pitted against more advanced Western firms and forced to operate in institutional environments designed to benefit these established interests. Following many

49 Barboza 2013.

others in his generation, Wan Hongjian's outlook became increasingly nationalistic. He argued that the firm needed to double down on distinctly Chinese products for both the domestic and the international market. He opposed the Smithfield acquisition from the outset and even quit the company in 2013 when he wasn't able to talk his father out of it.[50]

In 2018, however, an aging Wan Long invited his son back into the firm, apparently hoping to reconcile their differences and secure a stable transition of power. But Wan Hongjian's return was not accompanied by any change of opinion. As the succession loomed, the Smithfield question again grew into an open feud. After the series of disasters in 2018, 2019 and 2020, rumours began to swirl that Wan Long was planning to choose someone else to inherit the company – possibly his younger son, Wan Hongwei, or a trusted executive. The conflict finally reached a peak in 2021, when Wan Hongjian stormed into his father's offices at the firm's Hong Kong headquarters. Though it remains unclear exactly what transpired, the confrontation ended in a violent outburst, with Wan Hongjian apparently smashing his head through a glass door before being pinned to the ground by security and ejected from the building. He was subsequently fired from his position as executive director and deputy chairman for 'misconduct' and 'aggressive behaviour.' Soon after, the elder Wan announced that he would be retiring from day-to-day management. Though he would retain the title of chairman, his younger son, Wan Hongwei, was promoted to deputy chairman and executive director, with another younger executive, Guo Lijun, promoted to CEO. After several weeks of silence following his firing, Wan Hongjian responded to the announcement by penning a public essay on WeChat accusing his father and his close associates of tax evasion, pocketing cash, inflating prices, and illegally transferring funds offshore, alongside a litany of allegedly poor management decisions. After the release of the letter, the company's stock price tumbled by 11 percent, erasing roughly 1.4 billion USD from the firm's market valuation. The new leadership of WH Group immediately denied the allegations, but the stock price continued to decline, reaching a five-year low. Nonetheless, no charges were ever brought against Wan Long and the revelation resulted in no change in leadership.[51]

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50 Wenxin, Fan 11 November 2021 'Feud at Smithfield Food's Parent Company Shows Messy Underside of Chinese Takeover', The Wall Street Journal. https://www.wsj.com/articles/feud-at-smithfield-foods-parent-company-shows-messy-underside-of-chinese-takeover-11636626600

51 Cheng, Kelsey and Zhou Wenmin 24 August 2021 'Family Feud at Pork Giant Intensifies as Claims of Founder's Ousted Son Rejected,' *Caixin Global*. https://www.caixinglobal.com/2021-08-24/family-feud-at-pork-giant-intensifies-as-claims-of-founders-ousted-son-rejected-101759385.html

4 Secession

Pork is the meat that tastes most like human flesh. No other domesticate recalls to us such an unsettling proximity. Maybe it is just their too-familiar pinkish skin. Maybe their nearly human eyes, which seem always to be filled with the same sad resignation as our own. Or maybe it is the uncanny echo of the voice we hear in their wailing when wounded or scared. Among my own earliest memories is that of a hog screaming after a botched attempt at slaughter, its agony rising like a searchlight through the pines. This intimacy seems more than incidental. Contemporary studies have demonstrated that pigs are by far the most intelligent of all livestock and are among the smartest and most sociable animals in the world, with a sentience often compared to that of human toddlers.[52] Usually, this fact is stressed to demonstrate that such creatures can think and suffer, as if this realisation would kindle an ethical obligation in a species that has never shown much hesitation in inflicting torture on its own. But anyone who has ever looked into the eyes of a pig has, first and foremost, seen their own body reflected back to them, a darkened silhouette perched in the pupil's pitch. Our sense of self drowns in the bottomless pit of otherness. In other words, the suffering sentience of the swine reflects the conquest of our own minds and bodies by some supervening force. What's worse, this force arises from our own sociality. The pig is a mirror and in it we see puppets strung up for slaughter, our own nervous systems splayed open into dripping, diaphanous webs, drawn not by some other creature moving above in the dark as the farmer moves beyond the pen but – and this is the real horror – each strung to the others such that we are all tugged by every painful movement, together and alone.

The horror of domestication is, fundamentally, a political horror. Domestication not only destroys any independent basis for revolt but also enforces a resigned complicity on the part of the domesticated subject. This then leads to the question repeatedly posed by Camatte, and clearly visible in the eyes of the swine: 'How can destroyed human beings rebel?'[53] In an autobiography

52 Marino, Lori and Colvin, Christina M. 2015 'Thinking Pigs: A Comparative Review of Cognition, Emotion, and Personality in Sus domesticus', *International Journal of Comparative Psychology*, 28. https://escholarship.org/uc/item/8sx4s79c; Michael Mendi, Suzanne Held, Richard W. Byrne 25 September 2023 'Pig cognition', *Current Biology*, 20(18), R796. https://www.cell.com/current-biology/pdf/S0960-9822(10)00917-6.pdf; Malmgren, Evan 24 November 2021 'The Intelligence of Swine', *Noema*. https://www.noemamag.com/the-intelligence-of-swine/

53 Camatte 1995, p. 85.

recounting his upbringing in rural Georgia during the Depression, author Harry Crews describes the peculiar resignation of pigs to their own slaughter. As his uncle pours slop into a trough to attract the pigs, his cousin approaches from the back with the axe, straddling each animal and 'patiently waiting for the hog to raise its snout from the slop to take a breath, showing as it did the wide bristled bone between its ears to the ax.' His cousin then moves down the line:

> It never took but one blow, delivered expertly and with consummate skill, and the hog was dead. He then moved with his hammer to the next hog and straddled it. None of the hogs ever seemed to mind that their companions were dropping dead all around them but continued in a single-minded passion to eat. They didn't even mind when another of my cousins … came right behind the hammer and drew a long razor-boned butcher knife across the throat of the fallen hog. Blood spurted with the still-beating heart, and a live hog would sometimes turn to one that was lying beside it at the trough and stick its snout into the spurting blood and drink a bit just seconds before it had its own head crushed.[54]

Of course, the story is not really about pigs, but about our own complicity in the similarly slow and bureaucratic slaughter of humanity. Through this complicity, the sledgehammer comes for us all, in the end.

And Crews is under no illusions, understanding full well that only custom separates the human from the hog. After slaughter, the body of each pig is dragged to a pit containing a barrel of nearly boiling water, used to scald the fresh-killed animals so that their skin can be scraped from them. While playing with the other children on the slaughter field, Crews is accidentally cast into one of these boiling vats. He floats for a moment in the scalding water beside the body of one of the hogs before being pulled out and stood up on his feet, everyone screaming and staring at him as if he were death incarnate:

> I reached over and touched my right hand with my left, and the whole thing came off like a wet glove. I mean, the skin on the top of the wrist and the back of my hand, along with the fingernails, all just turned loose and slid on down to the ground. I could see my fingernails lying in the little puddle my flesh made on the ground in front of me.[55]

54 Crews 1978, p. 115.
55 Crews 1978, p. 117.

The others quickly gather round and, in seeking to save the child, strip his clothes from him. But this only makes things worse, pantomiming the scraping of the hogs: 'There is no way for me to talk about it because when my shirt was taken off, my back came off with it. When my overalls were pulled down, my cooked and glowing skin came down.' Crews understands the frightened ritual as a facsimile of the slaughter of the animals proceeding nearby: 'I still had not fallen, and I stood there participating in my own butchering.'[56]

For Camatte, the complicity of a desecrated, domesticated humanity in its own oppression ultimately proves to be an intractable problem.[57] Throughout his later work, he gradually abandons the Marxian critique of capital, gives up hope in any concrete communist project, and instead adopts an essentially millenarian faith in some coming catastrophe. In his view, the human population had increased to such an extent that any attempt to restore vitality to the system would 'involve such a leveling, such a degradation of human beings that capital is no longer able to regenerate itself.' In fact, he claimed – now nearly half a century ago – that the law of value had already been extinguished and the capitalist mode of production was in the process of dying out. What remained was simply a 'type of bardo,' the period of confusion that a person experiences (according to Tibetan Buddhist practice) in the moments that follow death but precede entry into the next life.[58] Although Camatte maintained that the death of capital and our passage through it would require some vaguely-defined human activity to be realised, he offered few clues as to what this activity might be.

At best, he could gesture toward uprisings of the youth, which offer hope, in his view, precisely because young people have not yet been fully broken on the spurs of work and wage. Similarly, he saw dim glimmers of the coming community in the hippie communes and bright-eyed religious sects of the era. Even though he recognised that such utopian schemes and 'microcommunities' were, ultimately, products of capital, they at least suggested the possibility of a vaguely defined 'return' to the 'human community' through heresy and secession from a dying capitalist world. In the end, Camatte himself abandoned further theoretical intervention and retired to a permaculture project in the forests of France, embracing a bitter quietism that, despite any protests he

56 Ibid.

57 At best, he can gesture toward uprisings of the youth, which offer hope precisely because young people have not yet been fully broken on the spurs of work and wage. He also sees dim glimmers of the coming community in the ascending hippie communes and bright-eyed religious sects of the era, though at the same time recognising such utopian schemes and 'microcommunities' to be products of capital.

58 Camatte 1984, pp. 195–6.

might make to the contrary, ultimately proved homologous with the romantic misanthropy popular among other baby boomers – and which would later help to justify the abandonment of mass politics in favour of a rapacious escapism visible, for example, in the transformation of the California counterculture into the cult of Silicon Valley. Half a century later, the persistence of the law of value despite many failed predictions of its imminent demise now poses to us a world which is, if anything, more bleak. The material community of capital seems to have supplanted nearly every social form that once lay beyond its bounds, commodifying life down to the genetic level. Political struggle has been reduced to little more than a ritual to reproduce capital and animate the rotting limbs of the state. Rather than forging a revolutionary subject, the further development of the forces of production has instead induced rapid climate change that seems to carry with it nothing more than the prospect of literal extinction or, at the very least, a cascading civilisational collapse.

5 The Horde

The question, then, now, and always, is simply how might a partisan force emerge from within a domesticated world? Has capital itself not absorbed every revolutionary movement hurled against it and converted all parties into rackets, in the end? This is eventually Camatte's conclusion. Faced with the erosion of any ontological essence to which the species might 'return' in order to realise its true community, Camatte's late work often seems to imply that domestication is simply too extensive, and that the human community has succumbed to 'total subsumption' by capital. All demands are incorporated into day-to-day governance. Every revolution is consumed and converted into yet another rejuvenation of the productive forces. There can be no rebellion among the damned. But is this really true? Is partisanship produced solely through secession from the world that it seeks to overturn, or can it operate as immanent force within that world? Here, again, the pig offers a useful counterpoint, demonstrating that the process of domestication is not nearly as decisive as Camatte seems to think. In much the same way that an animal can be broken through continual conditioning, the retention of this conditioning also requires the construction of an environment that constantly reinforces domesticated behaviours. If that environment is porous or breaks down, two things happen: first, the shaping force of domestication weakens and previously suppressed behaviours begin to reappear; and, second, a new environment will introduce new stimuli that pose new behavioural puzzles for the mind and body of the animal, inducing a new sequence of transformation.

If the new environment persists long enough, this induces novel speciation. In fact, there is a long-running controversy within the biological sciences about whether domesticated pigs even constitute a species distinct from the wild boars of Eurasia from which they originated. This controversy is reflected in a taxonomical debate stretching back to Linnaeus, with wild boars classed as *sus scrofa* and domestic pigs classed as either *sus domesticus* (their own species) or *sus scrofa domesticus* (a subset of the Eurasian wild pig), depending on the political predilections of the scholar. What makes this debate even more interesting today is the steady rise in novel variants of wild boar in places like North America, due in large part to centuries of domesticated hogs escaping captivity and interbreeding with Eurasian boars introduced for sport hunting. Subsequent generations of these hybrids, called razorbacks, have since incorporated advantageous characteristics from both subspecies: from the wild boar they gained enhanced intelligence, strength, and speed (some can run up to 30 mph); from the domesticated pig, rapid growth (up to 400 pounds), and hyper-fertility. But the process is not simply a matter of hybridisation. In fact, domestic pigs that escape into the wild soon undergo phenotypic changes at the individual, epigenetic level, rather than across generations. Their pale skin darkens and is covered with increasingly coarse hair. Their snout lengthens and any teeth not clipped at birth sharpen into tusks. They grow both more aggressive and more intelligent.[59]

In the early 1980s, when data on the phenomenon first began to be collected by the USDA, 550 counties already had sizable razorback populations. Not coincidentally, the historic origin-point for the animals seems to be the very same cluster of hog farms that birthed the CAFO system: when mapped, 'the pigs' expansion from the 1980s looks like a tide flowing inland, from the Atlantic Coast into Pennsylvania, Ohio, and Michigan, and from the Gulf Coast up through Texas and Louisiana into Missouri and Illinois.'[60] By 2023, the figure had tripled to 1,496, with the highest concentration remaining in many of the same southern states where the CAFOs are concentrated. Recent genetic evidence even indicates that the spread may have been accelerated by for-profit hunting ventures illegally capturing and transiting feral populations across state lines from the south to the west. As of the early 2020s, the total population was estimated to be close to six million.[61] With few natural predators, the razorbacks have become the most intractable invasive species in the

59 McKenna, Maryn 21 March 2023 'Feral Hogs are the Invasive Menace You've Never Thought About,' *Wired*. https://www.wired.com/story/feral-hogs-worst-invasive-species/

60 Ibid.

61 Ibid.

US, uprooting crops, trampling sensitive ecosystems, destroying lawns and golf courses, transmitting diseases (namely swine fever, brucellosis, and pseudorabies) to both wild and domesticated animals, and even allegedly attacking children and pets. The USDA's official designation of the problem characterises it in the language of assault and invasion: a 'Feral Swine Bomb.' In response, several states have not only encouraged widespread hunting of the animals, but even organised hunting parties on the scale of small military campaigns. For example, the Missouri Feral Hog Elimination Partnership killed a total of 54,000 hogs between 2016 and 2021, with the state's Department of Conservation tracking the progress through several carefully measured 'Elimination Areas' throughout rural counties.[62] These campaigns co-exist with aggressive sport hunting, as in Texas, which 'allows hunters to machine-gun hogs from privately operated helicopters,' a practice also used by federal agents tasked with eliminating the population in the Carolinas.[63]

As the language suggests, the stated goal of conservation agencies is to completely eliminate the population. Nonetheless, the animals are smart enough to rapidly adapt their own tactics in response: 'hunted during the day, they will switch to foraging at night. Hunted with traps, they learn to recognise and avoid them. And hunting with aircraft taught them pretty quickly to recognise engine noise and take cover.'[64] In other words, the razorback provides a classic illustration of protracted guerilla warfare against a hostile world. We see in them the immortal, insurrectionary impulse, an entire species existing 'at daggers drawn with the existent, its defenders, and its false critics.'[65] This is, of course, all a bit tongue-in-cheek. But the case does offer a legitimate lesson about how latent contradictions in a domesticating environment can induce a rapid breakdown of the domesticating force itself, which then generates an oppositional current that is both immanent to that environment and destructive of it. Although the rutting and rampage of the razorback horde has been devastating for certain other sensitive species – giving the USDA its cleansing mandate – it also represents the creation of a terrifying new nature equally opposed to the industrialised plantation landscape of modern agriculture, to the deindustrialised wasteland of suburban lawns, and to the leisurely rural

62 Karnes, Sara 20 February 2022 'Feral hogs wreak havoc on land, carry disease. Officials aim for 'elimination' of species,' *USA Today*. https://www.usatoday.com/story/sports/outdoors/2022/02/20/conservation-official-talks-elimination-invasive-feral-hogs/6722179001/

63 McKenna 2023.

64 Ibid.

65 This is the title of a well-known, anonymously authored pamphlet that was popular among insurrectionary anarchists in the 2010s.

idyll of the urban conservationist. We might even lean into the metaphor and claim that, through the madness of its worldmaking, the horde is also sculpting an entirely new and feral flesh, faster, stronger, and smarter than that of both its wild and domestic progenitors.

In breaking the bounds of domestication by waging war against everything, the razorback also provides hints about the potential path for a revolutionary transformation of the human species. On the one hand, revolution must be a similarly immanent process aimed not simply at toppling the profane order and seizing power but instead at breaking open the transcendent architecture of hellworld itself, enabling the construction of communism through a protracted struggle within and against the eldritch horror of capital. After all, the coherence of the system's social logic into an 'automatic subject' is, ultimately, the mere reflection of our own collective self-activity. This is the basic pattern through which Marx himself unveiled the inner workings of capitalist society:

> At each stage of the presentation, social forms and the things that represent them are first presented as if they had a life of their own and a social life with each other, independently from people. Then it's revealed that it is actually us as people who give life to these forms through our actions, and that in doing so, proletarians are dominated by capital through the capitalist class as a whole, as well as by each particular capitalist.[66]

And this same pattern, winding in reverse, is the recipe for the revolutionary overthrow of those very social forms. Battles against particular capitalists can cascade into struggles against capital as a class and, from there, into a more expansive social war against the world as it presently exists, governed by 'capital' in the abstract. This entails a partisan process of organisation, increasing in scale as it advances, while also penetrating into greater depths of the social system at each stage. The root of this process is the recognition that the dark, domesticating god fleshed in its planet-strangling horror of fixed capital has simply been dead labour animated by our own activity all along. If we were to compress Marx's entire science down into a single slogan, then, it would likely be a warning against the fetish of capital as an autonomous, objectified agency that so mesmerised Camatte and, in a way, his entire generation. It would be a simple dictum, really: We Live in a Society.

66 Gouldhawke 2023.

6 Ploutonion

The story told here is an old one: a katabasis. Nor is this a metaphor. This book is the result of a long, infernal journey that has taken me across countries and continents, delving deep into the hidden abode of production that sprawls sweat-slick beneath the manicured surface of our 'post-industrial' society. And it attempts to illustrate the tortures of this hell in a somewhat systematic manner, modelled on the long lineage of katabasis epics from which it draws inspiration – *Capital* foremost among them. This certainly includes the lonely tragedy of the proletarian condition, often expressed in deeply personal forms of suffering. But these horrors are also, at the larger scale, only visible in abstraction. Marx therefore serves as something like our Virgil, offering a science that deploys the corrosive force of critical inquiry to unveil hidden social relations beneath the profane appearance of the material world. It is, ultimately, not enough to simply document class as a lived experience. We must also grasp, in theory, the murky megastructures that shape daily life. Only at this scale can we then see that the real terror is found not in the torture that is work or even in the starved, suicidal abjection of surplus existence, but in the tantalising wealth of the world held just beyond our reach. Capitalism is not horrific because it casts us all into absolute immiseration but because it produces, in Marx's words, 'surplus capital alongside surplus population.'[67]

In other words, the worst torture is precisely that the system works: that capitalism is, in fact, a developmental force that has produced and continues to produce an immense material abundance, the scale of which is entirely unprecedented in the history of humankind. And that, despite this, the worst medieval horrors persist not as accidents but as necessary outcomes of this social system. Though much of this book will focus on locations in Asia and Africa – representative of the general proletarian condition, given that these are the places where the vast majority of humanity resides – nearly every feature documented here is reproduced, to varying degrees, even in the wealthiest of countries. This is one reason why we begin in this most American of settings: at the very gates of hell, where the bronzed statues of the CEOs stand smiling on the coastal plain that birthed the plantations that founded the nation. And where the simultaneously environmental, epidemiological, and social devastation wrought by industrialised hog farming illustrates that the worst horrors are never far from home. Though located in the richest country in the history of the world, those same meatpacking plants have long been among the most deadly

67 Marx 1981, p. 359.

and dangerous workplaces. The conditions of work in places like Tar Heel and the "Golden Triangle" of Eastern Kansas resemble, in every respect, the otherwise distant image of the "sweatshop" detailed below. And, over the past few decades, these factories have hosted some of the most brutal labour struggles in recent US history. Workers subjected to gruelling ten- and twelve-hour shifts of manual labour have seen any attempts to organize or to mobilize their existing unions met with brutal measures on the part of management, sometimes in league with *de facto* company unions, including physical attacks on union organisers and mass deportation. Meanwhile, thousands of meatpackers were sacrificed to the companies during the few months of the coronavirus pandemic. We could select any number of similar examples across any number of industries.[68]

As in any katabasis, we must first abandon all hope. And yet this does not mean abandoning the spirit of the struggle so much as giving up the happy illusion that technical miracles, progressive reforms, or serendipitous collapse will somehow deliver us from torment. Above all else, it means abandoning the illusion that there is anywhere left to retreat to. I know this, on a personal level, because I myself was raised in the ruins of permaculture projects mouldering in a sylvan borderland settled by hippies fleeing the cities much as Camatte himself did, in more or less the same span of time. In the end, they found no escape. The experience exhibits a certain poetic symmetry. If this were a fairytale, we could warp time into a clean circle: imagine the disillusioned Camatte burying his copies of Marx's manuscripts somewhere out there in the depths of the wilderness, perhaps beneath the floorboards of a geodesic dome. And then a barefoot hillbilly child playing in the sun-blasted ruins of the hippie holy land unearths the tome by accident. The pine needles shine in the warming light like a hint of coming fire. Each season the hills seem to heave closer to the sun. Maybe, drawn by the whisper of some bloodsworn magic moving in the ink, the child takes the text to a deer-bedded hollow where the musk of each mildewed page mixes with the sweet incense of sap weeping from the forest's many wounds. The ancient words are sounded out under the creaking of the pines and the strange trilling of the Steller's jay, trickster cousin of the crow: 'the history of all hitherto existing society is the history of class struggles.'

68 Even more abject examples can be found beyond the bounds of industry entirely: by the middle of the 2020s, almost every major American city held within it a second, hidden city of the homeless, often counting its population in the tens of thousands, all exposed to horrific forms of deprivation, continual, mind-breaking psychological torture, and physical ailments befitting the peasantry of the dark ages which, if survived, leave behind a lifelong trauma.

And maybe, in response to the liturgy, a dark wind rolls down from the most secluded groves high in the kneaded mountains where the wolverines hide and sasquatch abides outside of time. The sun-warmed needles shiver like magnetic filaments and the spirit of communism leaps from the flesh-bound book with the force of a demon unbound. The fire passes from the ink, from the sun-scorched hills, from the soft warm bed of needles, and settles, again, into the skin.

But this is not a fairytale. Until recently, Camatte was still alive and sometimes answered emails. And communism did not leap from the pages of the ancient texts into my mind all at once but was instead beaten into me slowly by a life of work and poverty and maybe a peculiar sensitivity to the sad, certain crushing of the soul. Whatever else hellworld takes from us, then, it also makes us communists. And every generation of communists adds its verse to the weary ode. This book, if it can be called that, is fundamentally about the great, world-spanning beast that we call the economy. But it is not so much a work of political-economic analysis as a critique of political economy in the form of a horror story. By documenting the mundane experience of our hellworld, it illustrates the cosmic terror inherent in the material community of capital – its conflictual imperial order, its chaotic governance through crisis, its reshaping of the human species and the crust of the earth – and, through this illustration, hopes to liquidate the illusion of omnipotence. In writing a book, it is conventional to present an introduction that outlines the content, states the basic argument, and explains how the work makes a novel contribution that, as they say, 'fills a gap in the existing literature.' But there is nothing conventional here. This introduction is simply a foreboding, like a shadow cast backward from the light of a bonfire burning somewhere ahead. The book makes no novel contribution to 'the literature' and refuses to stake any claim within or against prevailing intellectual trends. In fact, it says nothing new at all. It instead repeats only the old and terrible reality, counterposed to a communism that is, ultimately, invariant.

Perhaps it is not even a book, then, but something more like a sutra: a text of transformation, in which the steady repetition of certain intellectual themes interweaves with images that span the thin border between sublimity and terror to induce a reconfiguration of the heart and, thereby, the body. At times, I am not even sure these words were written, so much as unearthed – drawn up like a curse from the red soil beneath the hippie homestead, from the rubble at the edge of the factory district, from the mud of the cassava field, and the sand that fills the trenches of the artisanal gold mine. Much of the source material was quite literally pulled from life and work in such places. This includes my own biography of miserable jobs performed for miserly pay in fields and factories. But it also includes the stories told to me in formal interviews and informal

conversation over the course of more than a decade of on-the-ground research on three continents, in three hemispheres, and including representative cases from each stratum of what Li would call the 'traditional three-layered structure' of the world-system.[69] The book is roughly divided into two parts. The first, composed of chapters one through five, is centred on China, elaborating the theory of capitalist society and exploring the dynamics at play in the core of the planetary factory in loosely alternating chapters. The second, composed of chapters six through twelve, slowly spirals outward, appraising global finance, global development, and key cases drawn from the global class struggles of the past decade.

The work of writing was similarly distributed. This introduction was begun in a cheap room overlooking the crumbling streets of Tacoma, Washington (near the largest US military base on the west coast) and finished in a café beneath a new apartment complex across from a bustling shopping mall in Zhanjiang, Guangdong (an old naval town that today serves as headquarters of China's South Sea Fleet). Other chapters were scribbled in a notebook while sitting in the grit of factory districts in Dar es Salaam, in the bustle of crowded restaurants in Hong Kong, in tree-covered parks along the bank of the fast-flowing Yellow River in the desert city of Lanzhou, and across many other ailing, dead, and dubiously resurrected timber towns across the US Pacific Northwest. Similarly, the ideas presented here were found scattered in the sage-choked deserts of Northern Nevada, the mud of the paddy fields in the shadow of Thailand's export zones, and across the hard-packed earth on the roadside beneath Mount Meru in Northern Tanzania. The result is, hopefully, an incantation that illuminates the flesh of the world, regardless of location. If read properly, the economic sphere should slowly take on an eldritch animacy in the eye of the reader, each commodity re-animated under the force of the myriad social relations that weave it into the thing that it is.

If we trace that mist lying over the coastal plain back to its source, we find the waste lagoons sunk into the soil like doors to the underworld. Though their bottoms are sometimes lined with polyethylene, the massive pools (up to 120,000 square feet) are mostly uncovered, the shimmering effluent off-gassing into the open air such that the concentrated stench is quite literally unbreathable. Birds or other animals that get too close will periodically fall into the pits and die

69 Since much of this book focuses on trends within the core of the planetary productive complex, a large portion of this source material is drawn from interviews with Chinese workers, as well as long-running discussions and collaborations with informal groups of Chinese communists, feminists, and labour organisers. Nonetheless, this is not really a book about China, but about capitalist society as a whole.

there. As we teeter on the edge of the Sixth Extinction, perhaps their bodies will be embalmed in the bubbling, liquid shit like the fossils of Pleistocene megafauna preserved in pools of tar. Similarly, those who work in close proximity are slowly poisoned by the noxious fumes. If you approach the edge, you will grow lightheaded. If you fall in, the sludge is too thick to swim through and the gas too poisonous to breathe. You will die choking on shit and blood and methane.

The lagoons have therefore seen a string of deadly accidents, all the more tragic for their resemblance to a slapstick cliché. In one case

> a worker who was repairing a lagoon in Michigan was overcome by the fumes and fell in. His fifteen-year-old nephew dived in to save him but was overcome, the worker's cousin went in to save the teenager but was overcome, the worker's older brother dived in to save them but was overcome, and then the worker's father dived in. They all died in pig shit.[70]

There is nothing metaphoric, then, in calling these the gates of hell. In the Japanese Buddhist tradition, one of the special hells for monks who have broken their precepts is, in fact, the 'hell of boiling excrement,' as described in the *Horse-Headed Demon Sutra*. In Ancient Greece, the ploutonion – shrines to the gods of the underworld – were often established in geologic areas known to emit similarly poisonous gases. Inhaling the vapours at the ploutonion of the Phrygian Hierapolis, for example, was said to kill anyone but the eunuch priests associated with the local cult of Cybele.[71]

We begin, then, with the descent. Imagine living your life of menial labour, its small pleasures and cherished moments of warmth wrested from the wasteland of work and wage, only to slip and to die in the shit. Even worse, those few remnant links of love then draw your family members in after you one by one and you all die drowning together, alone. And there will be no recompense. The CEO will sleep soundly in a feathered bed, never even knowing you exist. The absurdity is outweighed only by the horror. The ruddy brown mucus strings from your flailing arms like a web. Every breath burns. Your body becomes a ceremonial vessel filled with thrashing flames. Imagine the feeling. Imagine the

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70 Tietz 2006.

71 Cybele was the ancient mother goddess of Phrygia, with roots apparently tracing back to the neolithic culture that built the city of Çatalhöyük, the oldest urban concentration ever unearthed. Originally a fertility goddess, Cybele also took on more chthonic aspects via the Hellenistic mystery cult and was later canonised as Magna Mater during the early Roman Empire. Divorced from their origins, these antediluvian deities of death and mystery would then influence Western occultism, from which many of the modern aspects of cosmic horror derive.

PHOTO 1 An image of Buddhist monks who drank alcohol or consumed meat being herded by horse-headed demons into the 'hell of boiling excrement,' from the *Monk-in-Hell Scroll*, 12th century CE
NATIONAL INSTITUTES FOR CULTURAL HERITAGE (JAPAN), PUBLIC DOMAIN (VIA WIKIMEDIA)

bio-industrial effluent filling your ears, your mouth, your nostrils. Imagine the stifling weight as you sink into sludge warmed by the Carolina sun, crushed and strangled and drowned all at once by the limbless embrace of a god you can neither name nor comprehend. Open your eyes and see in front of you now the terrible vision you will be given, unwilling, when the fluid pours into your skull – witnessing at last the sublime shadow-flesh writhing beneath the surface, your own mind melting into it as money melts in trade and bodies melt in time. Once they fish out your corpse and the corpses of your family, the open grave will remain, a tablet scraped bare. Other bodies will follow your own. Like everything I tell you here, this is not fiction. It really happened. It is happening now. It is happening all around you. And it will happen again and again, until we all decide, finally, to stop it.

PART 1

CHAPTER 1

Buildings Devouring People

The fire crackled like bones being split from their joints. We huddled with the squatters beneath a tarp in the half-demolished residential complex where they had once lived, the stairs to the remaining buildings smashed to prevent access, windows blasted out, bedframes hanging from collapsed upper stories. Around us, the rubble seemed to seethe, muscle-coloured firelight turning the stone almost animate like rawhide stretched over shattered cement, sharp but somehow insubstantial, melting in the heavy dark like heated fat. The pot bubbled and I could feel the steam breaking against my skin, a humid heat pressing against the humid cold settled on the broken stone beyond the thin halo of light. We could barely see each other, faces cowled in rough fabric gleaned from the periphery of the booming textile markets, skin glowing with the dim orange reflection of the campfire like lamps dropped here in the rubble at the end of the world and left to burn out slowly. We squatted around the cauldron in the unforgotten fashion of all things common. At first, we, the outsiders, tried to turn down the offered food. But our objections were waved away. There is no outside to such a circle. The bread breaks. The gift is given.

Behind us the old low-rise apartment towers loomed in the darkness, their first floors yawning open to vomit up rubble, speckled with the furniture that had been hurled from upper-storey windows. This demolition site was merely one of many, a single lot no more than the size of a few pixels in the average satellite image. Viewed from space, construction and demolition bleed into one another. The years pass and the machines send down their etchings of the Earth from the cold black heavens, each iteration tracing out the spread of the species across the planet's surface in a spectacular, grey bloom of built space. The pixels of concrete surge against the once-verdant greens now dimmed to deadened browns and yellows as grid-plots of soy and palm oil penetrate the last remaining jungles. Each pixel is a sharp square lit by diode-fires arrayed beneath the glass. Watch any timelapse of any satellite imagery and you will see it: the grey-brown growth, the billowing gases, the diodes reddening like pooled blood as the historic mean of any given earth system is strained and then broken. At night, the greys turn luminescent, hungry. We call this light humanity, maybe – the aggregate of our activity, visible in the trillion streetlamps of our million towns and cities. But humans seethe in the dark interstices just as easily, with maybe a fifth of the species still arrayed around the dim burn of fires much like this one, not so easily seen from space. So, the light is instead something

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more and something less. Disciples of the machines above turn to the machines below to derive from these pixels approximations of urbanisation, deforestation, and even industrial output. In so doing, they engrave for us an image not of 'humanity' but of that world-spanning beast conventionally called 'the global economy.' Like any eldritch horror, its gargantuan proportions and maddening structure ultimately exceed all comprehension. The material community of capital can be captured in no icon. The smouldering greys are therefore merely its incandescence, marking where it was and what it has done to the world in an afterglow of imprints pressed against the veil.

Nowhere were these glowing greys more heavily concentrated in those years than across the myriad counties of the Chinese interior, which had been left behind by the first urban takeoff along the coasts and now scrambled to catch up. When our view descends from orbit, the grey pixels resolve into huddling human specks encased in two parts fresh cement, one part rubble. Staring out into the dark expanse encircling that demolition site, I could see the dim shadows of empty condominium towers sprouted along freshly lain highways. Wet concrete glistened in the moon's silver knife-light. At the time, this seemed the very edge of that world-historic tide. Sitting at just under 20 percent of China's total population through the 1970s, the share of those living in cities had grown by roughly 10 percent every decade thereafter, rising first in the coasts, then spilling inland, the grey growth like a great flood cast up by the thrashing of some leviathan. On that night in 2012, the official figure sat just above 52 percent.[1] By 2022, somewhere between 64 percent and 65 percent of the population lived in cities. Moreover, in the course of that intervening decade, the share of urban population in the interior had grown nearly twice as fast as in the coastal provinces.[2] Given the size of the country – in physical terms, certainly, but even more in the sense of demographic size, since almost a fifth of the total human population is currently located there – it's no exaggeration to say that this blooming of built space tracks one of the most significant social transformations in history. At the very least, it is the fastest and largest reconstruction of the Earth's crust ever conducted by the human species – as the oft-quoted statistic has it, more cement was used in China between 2011 and 2013 than in the US over the entire twentieth century – mark-

1 These measures of urban population come from the World Bank (indicator: SP.URB.TOTL.IN.ZS).

2 For example: According to Chinese Census data, between 2010 and 2019, the leading coastal province of Guangdong saw its urban population share increase from roughly 66 percent to 72 percent (an increase of 6 percentage points), while the share in interior Henan grew from roughly 38 percent to 54 percent (an increase of 16 percentage points).

ing the moment at which capitalist society evolved from a merely global system to one better characterized as planetary, operating as a geospheric force in and of itself.[3]

1 The Great Enclosure

Around the fire, though, the stories told were tragedies of ash and rubble rather than epics of bright glass and towering steel. The residents recounted their long war of attrition with a local property developer: working hand in hand with the local government, the developer's real estate firm had succeeded in having the housing complex scheduled for demolition. This would allow the real estate company to win a sizable contract while also giving city planners access to the lucrative loans earmarked for development of the Chinese interior following the impact of the Great Recession in 2008 and 2009. In fact, loans such as these composed the majority of the government's massive 4 trillion RMB stimulus package, which was equivalent to 15 percent of China's GDP at the time. Only a third (1.2 trillion) of the total was contributed by the central government, with the remainder (3.8 trillion) financed by local governments and large industrial enterprises. However, the constrained tax revenues and crisis-stricken corporate profits available at the local level were far too small to provide the necessary funds. The shortfall was therefore only filled by lines of credit offered by the big banks, with the blessing of monetary authorities. The exact funding mechanisms went under many generic names, such as 'financing platforms' or 'investment vehicles,' but were most often linked to a practice called land financing (土地财政).

Long the primary mechanism behind urban development, land financing also encapsulates the more general process of enclosure, whereby both the physical territory and the human population are made subject to the demands of the market. While local governments in China had retained a large share of local tax revenues throughout the early years of the marketisation (from roughly the 1970s onward), fiscal reforms in 1994 instituted a uniform tax code and recentralised the tax system in favour of the national government. Following these reforms, the taxes retained at subnational levels declined sharply. Meanwhile, rapid marketisation had already created intense pressures for local governments to ensure economic growth. At the time, there was effectively no separation between high-ranking cadre within the local party-state and the

3 Smil 2013, p. 91.

first crop of fully homegrown capitalists. In fact, the two groups were often literally the same people, with state-appointed managers of industrial ministries and local enterprises using their positions to become the first of many CEOs, either retaining their official posts throughout or formally leaving government while retaining close connections with friends and family who continued to hold office. Meanwhile, rapid marketisation both contributed to and was strengthened by the ongoing decentralisation of the national bureaucracy.[4] Similarly, while administration had always been fragmented (despite projecting an image of centralisation), the 1980s and 1990s saw the simultaneous devolution of responsibility for production even further, down to households (in the countryside) and individual enterprises and industrial ministries (in the cities). Socialist-era welfare measures were similarly devolved and, thereby, eroded.

The sustained decline in state investment that began in those same years was only feasible because individual households, enterprises, ministries, and all other administrative organs were allowed to retain any profit they earned above their normal costs.[5] Local governments were therefore not simply forced to become more self-sufficient but also incentivised to stimulate rapid output growth, since they were now allowed to privately appropriate the proceeds. This system was gradually formalised by incorporating economic growth targets into cadre evaluations. But it is a mistake to portray it as something imposed on enterprises from above. Though eventually rendered into the national planning infrastructure, the phenomenon was, at root, an organic outcome of orienting production toward the market. Ultimately, the administrative aspect of this system grew into a 'franchising mode of decentralization' similar to that used in many modern corporations, in which each county government, for instance, was not only made into a sort of development company appraising the potential profits and losses from different investment projects, but even treated its own townships, subdistricts, and individual ministries as something like private contractors, each of which operated according to their own balance sheet appraised against targets of profit, output, and investment.[6] Beginning very early on, cadres within these ministries received a large portion of their pay not in the form of wages, but in 'bonuses' paid when investment exceeded this target. Often, it was high-level cadres themselves (or former

4 For a long-run overview of the collapse of the socialist developmental regime and the transition to capitalism that ensued, see Chuang 2016a and Chuang 2019a.

5 The classic account is offered in: Naughton 1995.

6 Ang, 2016, pp. 64–6.

cadres), alongside close friends and relatives (especially those in the Chinese diaspora), who were the ones being courted for investment.[7]

The tax reform of 1994 was designed to recentralise the rapidly increasing government revenues associated with the early growth boom. But it also created a 'fiscal cliff' for local governments, since the growing expenditures necessary to attract investment ensured an exponentially steepening deficit. Alternate avenues for increasing revenue were constrained by the fact that local governments in China are prohibited from levying new taxes or selling bonds. The new tax system did, however, allow subnational authorities to retain all revenue obtained from the leasing of land.[8] Though technically what is leased are simply usage rights (legally, the state still owns all land in China), in practice this is a system of *de facto* privatisation that has required detailed pricing and parcellation of each land plot.[9] Local governments thus leveraged land to obtain loans, which financed the construction of everything from roads to business parks to the gargantuan megaprojects often associated with the Chinese developmental boom, all of which then further inflated the price of land. In other words, the vast expansion of built space in China over the last few decades followed so closely on the heels of privatisation that the two were basically identical. Land financing therefore tracks the process of enclosure, in the classic sense, transferring usage rights from local administrative units such as village councils or county governments to *de facto* private owners who subject that use to market imperatives. Often, this entailed the mass destruction of villages and even substantial losses in arable land.

7 Ang 2016, pp. 29–33.

8 Ang 2016, pp. 86–7.

9 I adopt the conventional language of 'privatization' here for ease, but it is a poor method for grasping the underlying dynamic, which is less about nominal private ownership and more about the process whereby any given object (here, land) is yoked to the imperatives of the market. While this dependency often manifests through the nominal or *de jure* transfer of ownership rights to private individuals, real or *de facto* ownership can be (and frequently is) best conducted through other mechanisms, the most prominent of which are various forms of state ownership, but which would also include cooperative ownership and even the administration of commons subject to the imperatives of capital accumulation. In the case of land, the focus on nominal private ownership is even more backwards, since the uniquely fixed character of the land-commodity means that what is made tradeable is less the physical space itself than various rights to its use and the harvest of its natural resources. Marx himself pointed out that private ownership of land even tends to act as a hindrance on capital accumulation, insofar as it creates a class of landlords who live by parasitising the surplus value created in production. Thus, he argues that 'the abolition of landed property in the Ricardian sense, that is, its conversion into State property so that rent is paid to the State instead of to the landlord, is the ideal, the heart's desire, which springs from the deepest, inmost essence of capital' (Marx 1989).

In fact, by the time of the stimulus, so much agricultural territory had already been converted to commercial use – about 8.2 million hectares between 1997 and 2009, roughly the size of South Carolina – that food security was threatened and the central government began to impose increasingly strict rules against the paving-over of farmland.[10] But this only made the remaining plots more valuable, magnifying the financial multiplier of land leases when used as leverage for loans. Writ large, this process produced a unique form of 'speculative urbanization' founded on these inflated prices.[11] Land financing has thus been central to both the spectacular increase in built space visible in China over the past three decades and to the deeper changes in industrial geography that undergird this unprecedented urban boom. More than this, it has also been the driving force of dispossession and proletarianisation, with roughly 130 million former peasants losing their land rights between 1991 and 2013, and a total of 262.61 million individuals made into migrant workers by 2012.[12] To put the scale of the enclosure into context: 'the labour supply added to the global capitalist system by this process was roughly equal in size to that of all the world's industrial nations combined.'[13] As sociologist Zhang Yulin argues, if Britain's original enclosures could be characterised as 'sheep devouring people'[14] for the way that they replaced peasants with livestock pasture (and thereby cast these former peasants into the fires of industry), then China's enclosures might best be characterised as 'buildings devouring people.'[15] What could be seen from the satellites above as urbanisation was therefore also something like the spread of

10 Ang 2016, pp. 90–1.

11 Shin, Hyun Bang, 'Contesting speculative urbanisation and strategising discontents', *City*, 18(4–5), 2014.

12 In China, rural migrant workers (农民工) are not simply workers who have migrated from the country to the city but also those who lack a *hukou* (household registration) within the city that they reside, making it difficult to permanently settle and often allowing local authorities to effectively deport migrants in the course of mass demolitions or during bouts of labour unrest. Over the course of the 2010s, both the total number of migrant workers and migrant workers as a share of the total workforce continued to increase. As of 2019, there were over 290.77 million rural migrant workers in China, composing some 37.5 percent of the total workforce, according to the National Bureau of Statistics. For a history of the system, see: Chan 2009. For the role played by the *hukou* system in managing class conflict, see: Chuang 2016b. The number of migrant workers in 2012 is from: 2013 Annual Nationwide Migrant Worker Survey [2013 年全国农民工监测调查报告], *National Bureau of Statistics* [国家统计局], 12 May 2014. http://www.stats.gov.cn/tjsj/zxfb/201405/t20140512_551585.html; and the number of peasants dispossessed from their land is from: Zhang 2014.

13 Chuang 2019a.

14 The phrase originally comes from Thomas More's *Utopia*.

15 Zhang 2014.

the cadastral fabric that serves as the literal foundation on which capitalist production takes place. Rather than simply urban construction, then, the process was a simultaneously ecological and sociotechnical transformation in which all plots of land were cut into non-overlapping parcels with their use rights and resources assigned owners and the plots themselves given market values.

The heavily financialised stimulus was simply an amplification of trends already well underway. By opening cheap lines of credit, monetary authorities helped to intensify these well-established methods of 'market-driven land development' and drive the great enclosure into its final stage.[16] Urban planners and development bureaus worked with construction contractors, real estate moguls, local industrialists, and even major transnational corporations in the scramble to formulate attractive stimulus projects capable of competing for bank loans. The central government facilitated the process by lowering the reserve requirement ratio for banks and ordering the People's Bank of China (the country's central bank) to hack away at interest rates, which were cut from a high of nearly 4 percent in July 2008 to less than 1 percent by early 2009.[17] For the local elites governing poor areas in the interior, this was an enormous opportunity to attract investment away from the wealthy coastal deltas that had long served as the engines of export production. Over the preceding decades, China's integration into global capitalism had tilted the country's economic geography heavily toward the coast, creating new spatial disparities between the slow-growing or stagnant interior – defined by outmigration and/or lower-order production in agriculture, forestry, mining, waste management; supplying the most rudimentary inputs to export zones; or producing lower quality goods for the domestic market – and the rapidly expanding manufacturing hubs in the three budding megacities centred on the Pearl River Delta, the Yangtze River Delta, and the coastal area near Bohai Bay, all of which had been the main drivers of GDP growth and the major magnets for migrant workers. These coastal hubs were also, in a way, the source of the liquidity needed to supply the loans for the stimulus in the first place, which 'originate[d] largely from China's trade surplus and the export sector …' Since exporters are 'required to surrender their foreign exchange earnings to state banks in exchange for equivalent RMB' purchase contracts denominated mostly in dollars for made-in-China goods produced mostly in these coastal areas are what ultimately enabled the stimulus to take place.[18]

16 Huang and Chan 2018.
17 Orlik 2020, pp. 84–5.
18 Hung 2022a, p. 23.

By the late 2000s, rising costs in these established centres had already begun to see more and more firms, especially in labour-intensive or environmentally destructive sectors, relocating to cheaper areas in the interior. This sparked a scramble among local governments to successfully attract these relocating industries, which required land financing vehicles for the build-out of necessary infrastructure. As one official from a poor county in Hubei province noted, land finance 'is especially important for attracting investment. Our industrial park is fully equipped with manufacturing facilities, transportation links, water and electricity supply. Only with these facilities in place would investors be willing to come.'[19] But land financing first required the privatisation of land, though now at a scale that exceeded all earlier acts of enclosure: 'in less than a quarter of a century, 3.4 times more land has been enclosed in China than in Britain's 400 years of enclosures, and 7 times more than in the fastest 30 years of Britain's enclosures.'[20] The process required mass dispossession of the rural and peri-urban population, driving the outflow of rural migrant workers to the export processing zones on the one hand and, in the extreme, also producing a substrate of 'three-nothings peasants' (三无农民) who had no land, no job, and no social security.[21] Throughout interior counties in the 2010s, essentially every department within every local government was mobilised in a feverish drive to attract investment in league with the area's industrial and commercial enterprises, regardless of their other responsibilities. Residents were encouraged to draw on family networks, petitioning relatives who had migrated to the coast to return as entrepreneurs and minor investors. While the process often took on a collaborative character that spanned business and government, it was fundamentally oriented toward competition on the market. In a 2012 directive, the party secretary of that same county in Hubei laid out this basic logic in unambiguous terms: 'Investors are God; investment recruiters are heroes; bureaucrats are public servants; and those who harm business interests are sinners.'[22]

Though investment did not shift to the interior at anything like the rate of the original boom of export industries in the coast, the debt-fuelled stimulus nonetheless had a clear geographic impact. The basic outlines of the shift are visible in the especially rapid average annual growth of the value-added of industrial enterprises seen in interior provinces between 2010 and 2019 (Map 1), which is matched by growth in the total number of industrial enterprises between 2010

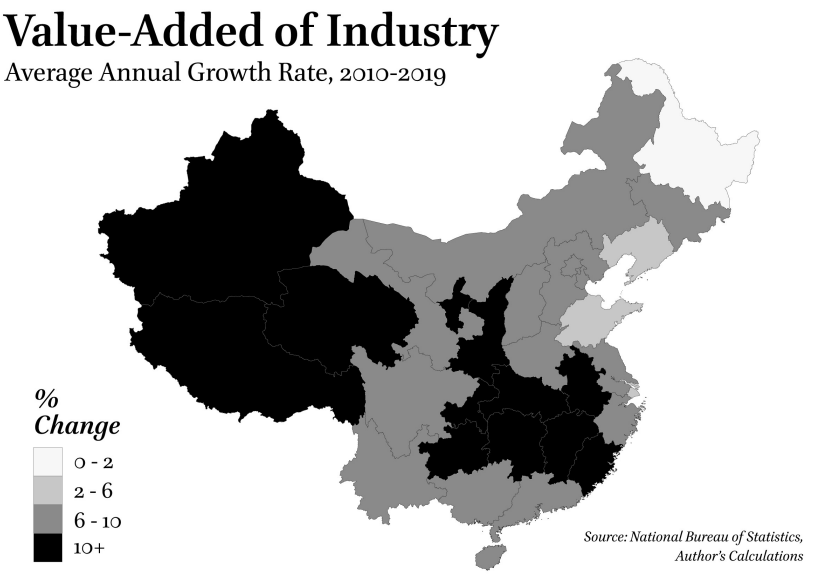
19 Quoted in Ang 2016, p. 209.
20 Zhang 2014.
21 Ibid.
22 Quoted in Ang 2016, p. 211.

and 2021 (Map 2).[23] Since infrastructure served as the engine of the stimulus, the pattern is even more evident when looking at measures such as the average annual growth rate in the total length of highways by province (Map 3). In all measures, the interior has clearly seen faster industrial growth and the coasts slower, though with substantial variation between provinces. The total number of industrial firms even declines, on average, in major coastal centres such as Beijing, Shanghai, and Shandong, all of which saw a pivot toward higher-end production and services and the systematic closure of heavily polluting industries over the course of the decade. Similarly, the ongoing erosion of the Northeastern rust belt is visible in a parallel loss of firms across Inner Mongolia, Jilin, and Liaoning.[24] In contrast to the coasts, however, the northeast has been far less successful at attracting higher-end replacements for departing industries, evident in its simultaneous loss of population. In the far western provinces, rapid growth is visible in all measures. In part, this is because the less populous west had much lower numbers to begin with. But it also represents the very real expansion of infrastructure and industry in areas such as Xinjiang, where there has been substantial investment – including, in this case, overt fiscal injections – and active efforts to attract Han settlers from the East.

Overall, though, it's clear that many parts of the interior saw only a muted impact when it came to the relocation of productive industries. Even if Beijing, Shanghai and Shandong lost industrial firms, established centres like Guangdong retained output growth on par with most interior provinces. Similarly, poorer coastal Fujian saw the value-added of its industry grow just as fast (11.78 percent YoY average) as neighbouring Anhui (12.02 percent) and distant Shaanxi (11.48 percent). Nor did infrastructural development necessarily lead to high levels of industrial growth, as is evident in the case of the southern island province Hainan, which ranked second (after Tibet) in highway construction but saw only moderate growth in the other measures – with much of the province's economic base passing straight from primary production (namely fishing) to tertiary activities like tourism. While many firms cer-

23 Since the pandemic caused a dip in output in 2020 and a spike in 2021, Map 1 only shows value-added measures through 2019. Meanwhile, since a statistical redefinition in 2011 changed the population of industrial firms being measured (from those with revenue above five million RMB to those with revenue of about 20 million RMB) and thereby produced an artifactual decline in many provinces in that year, I exclude this year from the annual growth rates averaged in Map 2.

24 In all cases where the number of firms is visibly declining, monopolisation also plays a role, with leading industrial firms in certain sectors growing through mergers and acquisitions throughout the decade.



MAP 1 Value-added of industry, average annual growth rate, 2010–2019

MAP 2 Number of industrial firms, average annual growth rate, 2010–2021

MAP 3 Length of highways, average annual growth rate, 2010–2021

tainly relocated to pursue cheaper costs, inertia is often an equally powerful attractor. The established productive complexes on the coasts were already entrenched, with many facilities easier to mechanise than move. In many cases, firms would choose to upgrade existing lines while also opening new factories further inland. In other cases, firms in especially labour-intensive sectors like garment production often found it easier to offshore their production entirely, with labour costs in Cambodia far cheaper than those available anywhere in China. Moreover, since economywide growth rates were slowing throughout the decade alongside inbound FDI, the pool of investment funds was relatively limited, compared to that available to the coastal provinces decades earlier. Thus, the bidding wars between localities were far more cutthroat affairs, with dire consequences for those who failed to attract investment.

Every plot of rubble quivers with the tremors of distant construction. What at first seems like a simple case of local corruption is, in fact, the efficient working of a land market ruthlessly adapted to facilitate the accumulation of capital. Even though the investment being attracted by land financing can ultimately be traced back to productive industries, the debt-driven character of the bubble would soon result in a rapid overgrowth of interests. In many places, real estate itself came to be the most lucrative investment. This even resulted

in the emergence of 'fake investors' who would come to poor areas with the promise of funding new factories and then fail to do so despite being awarded land titles, instead simply sitting on the mostly empty business park awaiting a spike in prices, at which point they would resell the plot.[25] Even genuine investors would often ask for more land than they actually needed, building some productive facilities and then using the rest for speculation – often using the larger land plot to portray the venture as a bigger business than it actually was so that it could be used as leverage in securing pricier loans in urban capital markets.[26]

The bubble effect was immediately visible in the way that credit allocation exceeded the size of the stimulus itself: 'In the first quarter of 2009, banks made 4.6 trillion yuan in new loans, more than triple the level in the same period a year earlier. By the end of the year, there was 9.6 trillion yuan in new lending.'[27] This was almost double the stated amount of the total stimulus (and roughly triple the amount to be contributed by local governments), amounting to a full 30 percent of GDP. Over the subsequent years, these loans only increased: 'Between 2008 and late 2017, outstanding debt in China soared from 148 percent of GDP to over 250 percent.'[28] Though driven by a real expansion of productive industries, in the competitive frenzy, much of what was built was unprofitable, redundant, or purely speculative. The capital market also biased flows of credit toward 'a subset of least efficient, loss-making state firms,' widely characterised as 'zombie' companies subsisting on infusions of credit and their ability to gather rents – though the impression that this is the cause of the subsequent slowdown gets the dynamic backwards: 'the rising share and loan proportion of SOEs [state-owned enterprises] are consequences of the economic slowdown, not the cause.'[29] While certain areas were successful in attracting new industrial investment from the coast, then, this success was muted by the generally diminishing returns on investment across the entire economy, driving down overall growth.

As the debt-financing of the stimulus accelerated the inflating real estate bubble, the rate of land seizures and demolitions increased apace. The situation faced by those residents huddled around the fire was by no means unique.

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25 Tellingly, the practice is colloquially referred to as 'hoarding land,' which, in Chinese, is the same word (圈地) used to describe the process of 'enclosure' that birthed the capitalist land system itself.

26 Ang 2016, p. 213.

27 Orlik 2020, p. 85.

28 Hung 2021.

29 The initial characterization of state firms is provided by: Lardy 2019, p. 22; and the cause-effect relationship is explained in: Lin 2024.

Stories like theirs could be heard in almost every city and had, by then, become common across the countryside as well. They explained how the government now considered them squatters, even though many had lived on the plot their entire lives. Technically, developers and local governments are required to compensate those evicted from their land – which by that time was either owned outright (mostly in the cities) or was allotted to individual families via village councils (mostly in the countryside) – at the market rate, and/or give each family a free, modern housing unit elsewhere. Often, however, residents were offered only meagre compensation and the new housing allotted to them was subpar or located in far-off suburbs or even neighbouring towns, much too distant from work and other obligations. In many cases, the leaders of the village council responsible for negotiating with the developer simply pocketed the cash, leaving villagers with nothing. The result was a stark increase in land-related protests, which composed anywhere from 25 percent to 65 percent of all 'mass incidents' in the country between 2010 and 2013.[30] Even where no visible protest action followed the eviction, residents often squatted until they had their demands met or were forced off the land. In some cases, these squats turned violent when construction companies tried to clear the area once and for all. In other cases, the struggle sat in a long *détente*, as each party sought to wait the other out.

When you sit too close to a fire for too long the world beyond the border of light gloams in writhing darkness, as if curtains of heavy, black velvet have been draped along the outer circle of the camp. Around that plot of land in Guangxi, swamps pooled beneath the pale shadow of karstic towers made famous in idyllic *shanshui* watercolours, the entire landscape a limestone labyrinth underlain by trickling caverns with mouths open like mist-drinking immortals. The region is a sieve swallowing tides of rain raised by the monsoon. This atmospheric river carves the karsts with the slow persistence of a storm spread out in time rather than gathered in a single catastrophe. Now, cement flows along the seeping limestone much the same. Like the monsoon tide it rises and falls, sculpting that which lies below. It crushes who it crushes and raises those already risen. Behind the black curtains I could hear it grinding forward, rubble piling on rubble and the monsters raking through it. Put your ear to the lime-

30 The wide range here is due to both differences of methodology and the difficulty of finding solid data on the exact numbers of strikes, riots, blockades and other forms of protest within China. The 65 percent estimate comes from the sociologist Sun Liping for the year 2010, while the 25 percent estimate comes from a report by the Chinese academy of Social Sciences, for all the years between 2000 and 2013. These and other data sources are reviewed in: Chuang 2016c.

stone and you can hear blind rivers flowing underground. Looking up through a hole torn in the dull plastic fibres of the tarp I could see the dim shape of stars through the mist, twinkling like welding torches glimpsed at night in the animate skeletons of far-off skyscrapers. I remember wondering if the building above the tarp might collapse on us, with one of its supporting walls already demolished. The fire crackled softer now. One of the squatters, an elderly man, wore a baseball cap gleaned from some domestic market fast-fashion line for teenage girls with the English word 'TAKE' embroidered in plastic rhinestones on the crown. The pot simmered. The squatter looked out beyond the fire into the wide waste and laughed at the nothingness.

2 Village in the City

While such struggles had, by then, become most common in the interior provinces where fixed asset investment was proceeding at the fastest rate, the starkest examples could still be found in sprawling cities on the coast. A few years later, I again found myself in a similar plot of land marked for demolition. Rather than a single apartment block in a struggling interior city, however, this was an entire village dropped into the heart of Guangzhou, the largest of the several urban centres within the Pearl River Delta megalopolis. Over time, the expanding city had flowed around the village, the latter like a large stone suddenly caught in the lash of a meandering river. The flow had reshaped its exterior, seeping into its crevices and nesting it in the mercurial currents of the market, but had ultimately proven unable to pick up the heavy stone and carry it downstream. In fact, the very force of urbanisation seemed to embed the village further into the fabric of the city. By the time I visited in 2014, the land below had become some of the country's most valuable real estate. But the village itself was like a pit excavated in the heart of the central business district, its low, dense concentration of narrow-alleyed, half-demolished apartments encircled on all sides by glittering skyscrapers, one of which, in a particularly biting irony, was even emblazoned with the logo of the China Development Bank. By that point, the sheer force of urbanisation had cracked it open – an entire corner had been reduced to mounds of rubble encircling a polluted pond, renters had left *en masse*, a wall had been erected by local officials in 2011 with security guards and civic police dug in at checkpoints near the entrances like trenches along a war-torn border – but, despite this, the great grey river of Guangzhou had not yet swept away the stubborn stone.

Though Xian village had by then gained a particular fame for the residents' bloody battle against local corruption, it was only one of many similar neigh-

bourhoods scattered through the megalopolis.[31] These areas, called 'urban villages' (城中村), were artifacts of rapid coastal development. On the one hand, they seemed almost like petroglyphs etched into the concrete surface of the city illustrating the agrarian past fossilised beneath. On the other, they were living organs of the city itself, essential to its industrialisation and now only partially vestigial. Though their Chinese name literally translates to 'villages in the city,' they are better understood as hyper-dense urban settlements defined not by quaint rural compounds housing a single extended family but instead by densely packed informal low-rise construction capable of housing tens of thousands of workers. Such areas are created in much the same way the squat in Guangxi had been. Throughout the Pearl River Delta, old peri-urban agricultural villages were absorbed by rapidly expanding city centres or had secured clusters of investment that made them new centres unto themselves. Agricultural fields were the first to go, followed by village housing. But, in some places, villagers had refused to sell off their personal housing plots to developers or had not agreed to deals made in their name by village councils. Often, these protests were entirely reasonable, since local leaders had simply pocketed money from land sales and disappeared, with the villagers left behind to demand compensation according to the letter of the law.

But such squats were not entirely altruistic, either. In the neighbouring villages that had sold sooner, locals often made minor fortunes. In some cases, villagers became shareholders in emerging industrial interests. In others, they were awarded units in the residential complexes that replaced their old rice paddies, renting to the migrant workers who flooded in to staff the new factories and thereby becoming wealthy landlords.[32] However, these early gains had to be weighed against the upward trend in property prices. One reason that urban villages persisted was precisely because the price of land continued to inflate, ensuring larger payoffs for those who waited the longest. Similarly, since villagers were legally required to be compensated per square foot for built structures, such areas were packed with hyper-dense 'kissing buildings' (楼吻楼) knit together by narrow, winding alleyways. These informal spaces were then rented out at bargain prices to migrant workers and small proprietors, turning the villages into bustling proletarian settlements and workshop hubs during the early stages of the export boom. Villages that once housed a few thousand

31 The battle was even etched into the larger cultural imaginary, with the scene of villagers clashing with riot police dramatised in the 2019 film *The Shadow Play* (风中有朵雨做的云) by well-known director Lou Ye.

32 For a description of this early period of industrialisation in the Pearl River Delta, see: Lin 1997.

people thereby grew by orders of magnitude, with some of the largest home to more than fifty thousand migrant workers at any given time. Across the region, this accounted for an enormous number of people. In 2014, Guangzhou, a regional centre for textile production, was host to some 138 urban villages.[33] In 2018, neighbouring Shenzhen, the world capital of consumer electronics, still had more than 300 despite a decade-long drive to demolish them.[34]

As labour-intensive manufacturing became less profitable and property prices rose further, however, there was increasing pressure to raze these vestiges of the sweatshop economy and replace them with new high rises. Given its location in the centre of downtown Guangzhou, Xian was a prime target. Throughout the 2010s, urban development across the Pearl River Delta was defined by the geographic tension between 'revitalization' efforts linked to rising real estate prices and the ongoing importance of low-cost production to the region's economic base. The sprouting of central business districts in cities like Guangzhou and Shenzhen had already displaced old production hubs built up over previous decades, pushing factories and migrants out across the ever-expanding periphery of the megalopolis. Nor were these merely local battles. By the early years of the decade, the growth in revenue from real estate and its associated financing vehicles was beginning to outpace other sectors, slowly displacing export-oriented production as the main pillar of economic growth.[35] This also meant that, although the battles in places like Xian appeared to be minor struggles against local corruption, the chain of interests stretched much further up. For example, the company that built the wall sequestering Xian from the rest of the city in 2011 was a local subsidiary of Poly Group, one of China's largest conglomerates, with its biggest lines of businesses in real estate and the facilitation of international trade deals for the defence industry (i.e., selling arms to buyers such as the Tatmadaw military junta in neighbouring Myanmar).[36] Poly Group began as a subsidiary of the China International Trust and Investment Corporation (CITIC), one of the first large for-profit enterprises established in China (in 1979) by Rong Yiren, economic advisor and close ally of Deng Xiaoping. Up until 2010, the conglomerate's chairman was He Ping, Deng's son-in-law. Under He, Poly's real estate wing had played an important

33 According to estimates in: Bandurski 2015.

34 Cai Yiwen 14 March 2018 'How Urban Villages Give Life to Modern Cookie-Cutter Cities', *Sixth Tone*. https://www.sixthtone.com/news/1001915/how-urban-villages-give-life-to-modern-cookie-cutter-cities

35 Hung 2021.

36 Nunns, Cain, 25 February 2013 'China's Poly Group: The most important company you've never heard of', *The World*. https://theworld.org/stories/2013-02-25/chinas-poly-group-most-important-company-youve-never-heard

role in the development of Guangzhou's business district, positioning the company alongside several other major developers as one of the loudest voices pushing for the demolition of Xian village.

The developers interested in the project had paid deputy mayor Cao Jianliao tens of millions to secure the plot, in league with village officials. Together, the city government, village council, and the property companies sent in thugs to beat up protesting villagers, erected the wall, put up checkpoints, deployed police and security guards, installed security cameras throughout the alleyways, and launched sudden raids with construction equipment, demolishing whatever buildings they could reach before crowds of protestors gathered in sufficient numbers to push them back. By the time I visited in 2014, the siege was finally ending. The checkpoints were still there, mostly unmanned. Rubble piled between low rises that had been ripped in half by backhoes. A gutted school building overlooked the ruin, its fallen walls revealing a second-storey mural of children playing. In the alleyway leading into one of the many fields of broken cement, a local graffiti artist had pasted surreal cutouts of a man in a suit holding a bouquet of flowers, his face painted in the image of a blue Chinese opera mask, symbolising uprightness and stubbornness, clearly an homage to the protests. By that point, most renters had already left. But the police had as well, and the alleys were filled with a sense of relaxed vigilance. The villagers' resistance had finally caught so much media attention that higher authorities stepped in, prioritising the case under the wide-ranging anti-corruption campaign that defined the early years of Xi Jinping's administration. Earlier that year, Cao had been placed under investigation, then fired from his position. Then, only a couple weeks before I first visited, it was announced that he had been expelled from the party altogether, setting off an impromptu celebration in the village that filled the air with the acrid scent of spent fireworks.[37] But success had never meant stopping the area's redevelopment. Over the subsequent years, new deals were struck with the villagers, with many making millions off the sale of their plots. By 2020, Xian had been torn to the ground, its dense, sinuous alleyways replaced with open plazas stretched between high rises.

Throughout the 2010s, such conflicts were commonplace. Almost everywhere one went, the character for 'demolish' (拆) had been scrawled onto buildings in ghostly white paint. In some cases, the demolitions targeted genuine rural villages in the periphery of fast-expanding cities, which were sold off *en masse*. These were accompanied by ongoing relocations of ruralites, now

37 Kaiman, Jonathan 22 September 2014 'Xian: The Village that took on corruption and won', *The Guardian*. https://www.theguardian.com/world/2014/sep/22/xian-village-took-on-corruption-won-china

targeting the poorest regions that had been least attractive to investors and emphasising the development of lower-tier cities closer to migrants' home counties.[38] In other cases, only one or two owners refused to sell. Sometimes, the development proceeded around them regardless, leaving the buildings perched precariously in the middle of fresh highways, squatting under the shadow of elevated railroads, or protruding alone and awkward in the centre of cleared construction sites – images of which soon won such structures the name 'nail houses,' for their stubborn obstruction of development. Regardless of resistance, demolitions proceeded apace. Demolition tended to be concentrated in the rapidly upscaling city-centres, pushing migrants out to the urban villages scattered across the suburban near hinterland, which remained largely intact.[39] Among the most famous of these city-centre demolitions was the 2011 razing of Dachong village in Shenzhen.[40] With a population of roughly 70,000 and covering a land area of some 10 million square feet, the destruction of Dachong was one of the largest urban demolitions in China and was itself only a small fraction of the demolitions planned by urban administrators across the Pearl River delta.[41] But plans often overshot reality. If the Dachong demolition was something like the developers' ideal – an urban village levelled to the ground and replaced by cold glass apartment towers and sleek, voluminous shopping centres – and the siege of Xian was something like their nightmare, then the case of Baishizhou, another urban village in Shenzhen, was more representative of the norm.

With an estimated population of roughly 150,000 in the mid-2010s, Baishizhou was likely the largest single urban village remaining in the Pearl River Delta (technically, it was five historic villages merged into one). While it had once sat near clusters of low-end textiles and electronics production, it was

38 These are generally the cases held up as models of poverty alleviation and hukou reform. Though continuing the basic pattern seen in earlier years, the relocations and late bursts of urbanization in the latter half of the 2010s were conducted with far less violence and produced far less resistance, on average, than the land grabs of the 2000s. In part, this was because they were conducted in an era with greater oversight, had more access to growing fiscal revenue earmarked for poverty reduction, and took place in the midst of the wide-ranging anti-corruption campaign. But equally important was the simple fact that the areas that saw the most intense poverty were not attractive sites for investment in the first place, making land grabs less lucrative.

39 Lai et al. 2021.

40 One of the best visual records of the Dachong demolition and its aftermath is a massive photo album by an amateur photographer based in Shenzhen, known only as 'Chris', available here: https://www.flickr.com/photos/dcmaster/albums/72157623363768464.

41 Al, Stefan 17 March 2015 'The Massive Death of China's Urban Villages,' *metropolitics*. https://metropolitics.org/The-Massive-Death-of-China-s-Urban.html

now wedged between upscale gated communities, amusement parks, and golf courses. Close to both Shenzhen University and the technology park housing the headquarters of major domestic tech companies Tencent, ZTE, and DJI, Baishizhou's original population of rural migrant workers looking to rent cheap rooms had slowly given way to students, lower-wage white collar workers, and struggling entrepreneurs trying to launch tech start-ups. Most of the city's migrant workers (still the vast majority of its population) had long ago moved north to the area just beyond the end of the light rail system, where marshland still abutted factory complexes and the scattered industrial suburbs slowly dispersed, before condensing again as one approached neighbouring Dongguan. For an entire decade, everyone seemed to assume that Baishizhou would suffer the fate of nearby Dachong, with rumours circulating each year suggesting that demolition might begin in the following months. The rumours were constantly bolstered by targeted demolitions within the village, its edges absorbed into the surrounding urban fabric and segments of its interior redeveloped in small patchwork projects.[42] In 2014, the government announced a general plan for redeveloping the neighbourhood, but never broke ground. In 2019, it made a similar announcement. As of 2022, however, Baishizhou not only remained largely intact, but a concerted pushback by residents, architects, and other advocates had even begun to transform public perception of urban villages more generally, highlighting their character and pointing out that these hyperdense, mixed-use neighbourhoods could play important roles in the reorientation of the region toward high-end technology and services.[43] Once considered an urban blight, the villages were now, ironically, upheld as paragons of a distinctly Chinese urbanism.[44]

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42 For one such story warning of the village's imminent demolition, see: Mackinnon, Eli 16 September 2016 'The Twilight of Shenzhen's Great Urban Village', *Foreign Policy*. https://foreignpolicy.com/2016/09/16/china-demolition-economy-the-twilight-of-shenzhens-great-urban-village-baishizhou/

43 Yang Qian 28 October 2019 'How Shenzhen's Urban Village Advocates are Learning from Failure', *Sixth Tone*. https://www.sixthtone.com/news/1004711/how-shenzhens-urban-village-advocates-are-learning-from-failure

44 A similar transformation took place in the urban complex around Beijing, where migrants were pushed even more aggressively to the city's periphery even as rapid urban demolition of the city's distinctive *hutong* neighbourhoods was halted, with the remaining *hutong* districts treated as ideal cases of mixed-use urbanism and placed under protected status as sites of historical and cultural importance. In so doing, however, the dense courtyard districts have slowly evolved away from housing the city's many poor migrant workers (now employed in white collar jobs and labour-intensive services such as food delivery) and are instead hip rental markets catering to artists and aesthetically attuned young professionals. For an overview of the trend, see: Kaiman, Jonathan 3 October 2015 'Historical now

3 The Great Trade Collapse

But, just as the practice of land financing was justified as an attempt to attract investment, the ultimate fate of urban villages – and of the Pearl River Delta megalopolis more broadly – has hinged on the changing prospects of industrial production. The tenuous preservation of Baishizhou has had less to do with starry-eyed urbanists than with the simple fact that lucrative rents keep flowing through the neighbourhood, which has been able to portray itself as a 'talent incubator'[45] in a hi-tech city now trying to rebrand itself as the 'Silicon Valley of Hardware.'[46] Elsewhere in the Pearl River Delta, other urban villages had survived in a similar fashion, successfully shedding their sweatshop past and pivoting to serve emerging industries. In Guangzhou's Beigang village, located on the same island as the city's University Town, hip cafes, restaurants, and art spaces had sprouted up to serve students, who also provided a steady demand for rentals. In Shenzhen, Hubei village had been partially spared demolition when architects, artists, and academics had publicly opposed the city's redevelopment plans, winning a commitment from the government to preserve two thirds of the village's historic architecture. Next door to Baishizhou, even the upscale OCT district – by no means an urban village – had repurposed old factory complexes to artist lofts and replaced demolished low-rises with scattered single-storey cafes and bookshops. In other words, the very development process that once threatened such areas had slowly begun to exapt their amenities, using historical features and urbanist aesthetics as new selling points in a changing market.[47] Even where classic sweatshop industries persisted, as in the villages scattered throughout Panyu District on Guangzhou's southern suburban fringe, they now did so in league with booming domestic ecommerce giants such as Alibaba and Shein.

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hip in Beijing as young artists gravitate to the hutongs', *Los Angeles Times*. https://www.latimes.com/world/asia/la-fg-beijing-hipsters-20151003-story.html

45 Mackinnon 2016.

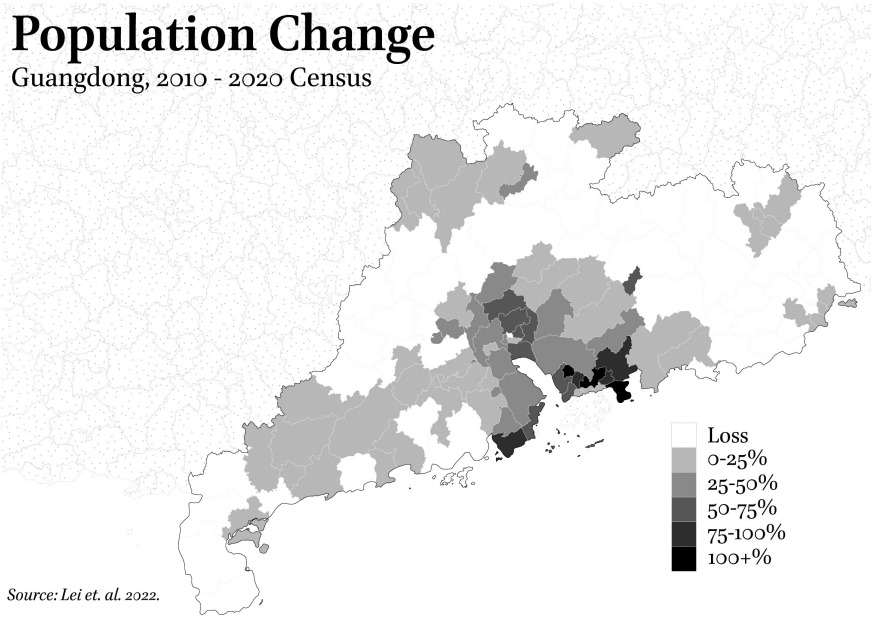
46 Demuth, Jim (Director) and Dixon, Posy (Producer) 5 July 2016 'Shenzhen: The Silicon Valley of Hardware', *Wired*. https://www.youtube.com/watch?v=SGJ5cZnoodY

47 The process is yet another demonstration that these struggles over the 'right to the city,' despite being lauded by academic Marxists, not only lack a radical edge but are in fact integral to the later stages of urban development itself, securing the special aesthetic and cultural 'character' necessary for asset prices to continue to inflate. In almost all documented cases, these sort of anti-gentrification struggles ultimately evolve into elements of gentrification itself, preserving the outward appearance of a neighbourhood's cultural history while largely cleansing it of the poor residents who gave the neighbourhood this appearance in the first place.

The changing demands of the global market were also visible in divergent industrial trends in different centres of the megalopolis. China's initial growth boom had been fuelled by labour-intensive industries producing consumer goods for export to wealthy end-markets in North America, Europe and Japan, much of which was concentrated, early on, in the four special economic zones opened to foreign trade in the late 1970s and early 1980s, two of which were in the Pearl River Delta. This led to a unique, exploded form of urbanisation in the region, with the relative flexibility of local governments, informal kinship connections across the border with Hong Kong (where the vast majority of early investment came from), and the new financing and administrative tools made available in the course of the reform era all contributing to drive the early development of built space in a pattern of 'rural-urban integration' (城乡一体化) wherein small-scale industrial and agricultural activities took place side by side, and the pace of growth in peri-urban areas far exceeded that in the region's established cities.[48] By the turn of the millennium, the population of Shenzhen, once a largely rural market town with a population in the tens of thousands, had spiralled into the millions, nearly matching that of Guangzhou. Initially, industrial specialisation in the delta was minimal, with factories in the textile, electronics, and various other consumer goods sectors relocating production from Hong Kong on an ad hoc basis shaped largely by kinship networks. Eventually, however, sectoral clusters would take shape, with Shenzhen growing into a hub for electronics production, Guangzhou specialising in textiles, Dongguan in footwear, Zhuhai in printer equipment, etc. As industrial upgrading proceeded, these clusters then grew more refined, with producer services attuned to each sector split off into central business districts and the lower-end production pushed to the urban outskirts.

The outbreak of the Great Recession was, in retrospect, probably the most important turning point in China's industrial history since the emergence of the export hubs themselves, transforming both the geography and supply chain structure of Chinese industry. The 'great trade collapse' caused by plummeting demand in the high-income countries meant that the export sector could no longer serve as the sole growth engine of the domestic economy – at least not to the degree that it had in previous decades.[49] But the implications for the global market were even more significant. After all, these coastal production complexes formed a central hub in globe-spanning supply chains, siphoning in raw materials from the world's far hinterland, purchasing cutting-edge

48 Lin 1997, p. 71.
49 Baldwin 2009.



MAP 4 Population change, Guangdong province 2010–20 census

technologies and components from the high-income countries, and spitting out a flood of cheap manufactures that glutted the world's consumer markets, driving down the cost of almost every major manufactured good. Meanwhile, a similar relationship played out in the upper echelons of finance, since low interest rates had cheapened US Treasuries, which were then purchased *en masse* by Chinese banks to keep the exchange rate low, thereby cheapening the *renminbi* relative to the dollar and ensuring that Chinese manufacturers remained competitive. China's trade surplus was therefore the twin of America's deficit. Economic historian Adam Tooze describes the apparently topsy-turvy contours of the resulting relationship: 'When it ran a trade surplus with the United States and bought American government bonds, poor China was exporting capital to rich America, funding American consumers to buy the products of its huge new factories.'[50] Ultimately, the domestic demand, cheap credit and inflated asset prices of places like the US were so closely linked to the prospects of Chinese industry that many came to refer to the chimeric fusion of the two economies as the 'G2,' or simply 'Chimerica.'[51]

50 Tooze 2018, p. 33.

51 Though popularised by Foxconn CEO Terry Gou, the G2 concept was first proposed by

While this planetary production hub had already weathered a number of other crises, each accompanied by temporary dips in either regional and/or global trade (the largest of which were the Asian Financial Crisis in 1998 and the dot-com crash of 2001) the scale of the Great Recession was different by an order of magnitude. Beginning in 2008, 'world trade experienced a sudden, severe, and synchronised collapse' that was both 'the steepest drop in world history' and 'the deepest fall since the Great Depression.'[52] In retrospect, it would also become clear that the crisis marked the point at which world trade stopped growing entirely. After almost four decades in which trade had grown as a share of world GDP, with particularly rapid increases from the 1990s onward, the trend peaked in 2008, then dropped precipitously in 2009. There were mild recoveries in 2010 and 2011 followed by a slow but steady decline that was only intensified by the outbreak of the global pandemic in 2020 (see Figure 2). After over a decade of little to no growth, the figure accelerated to a new peak in 2022 as trade recovered from the shutdowns – before dropping back below the 2008 level in 2023 (not pictured). In part, the decline was due to the deflation of the commodities bubble, itself linked to the Chinese infrastructural boom. For example, trade in total manufactures continued to grow after 2008, albeit at a slower rate, while mining and fuels peaked in 2011 and remained at this peak until roughly 2014 (i.e. throughout the height of the Chinese infrastructure boom) before declining thereafter.[53] Total world GDP, however, continued to increase throughout, and began to more decisively outpace the growth in trade toward the end of the decade.

Though the trade plateau has driven exaggerated claims about 'deglobalization,' it might better be characterised as the slow fragmentation of a specific global trade regime that took US-China trade as its nucleus. When disaggregated, we can see that the actual decline in global trade has been most pronounced for these two poles. Figures 3 and 4 show the share of trade by country, clearly demonstrating declines in trade in both the US and China, but no similar decline for the EU. Moreover, it becomes clear that the EU and emerging export hubs in places like Mexico and Southeast Asia have been largely

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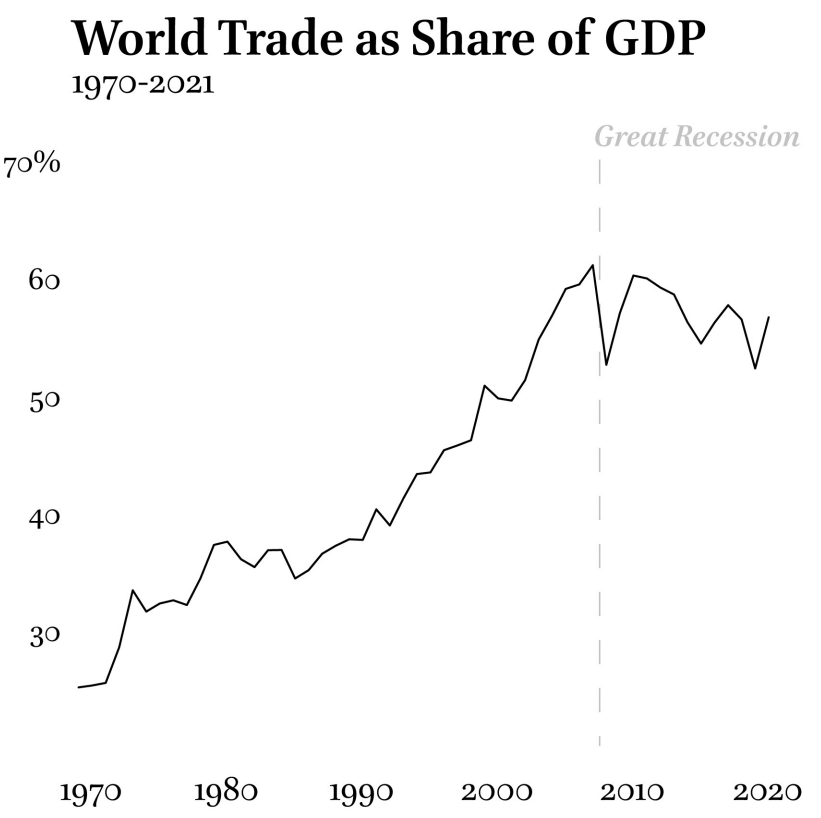
economist C. Fred Bergsten: 1 September 2009 'Two's Company', *Foreign Affairs*. https://www.foreignaffairs.com/articles/americas/2009-09-01/twos-company; The term Chimerica was coined by historian Niall Ferguson and economist Moritz Schularick, as explained by Fergusson: 1 June 2009 'The trillion dollar question: China or America?', *The Telegraph*. https://www.telegraph.co.uk/comment/5424112/The-trillion-dollar-question-China-or-America.html

52 Baldwin 2020.

53 Baldwin 2022.



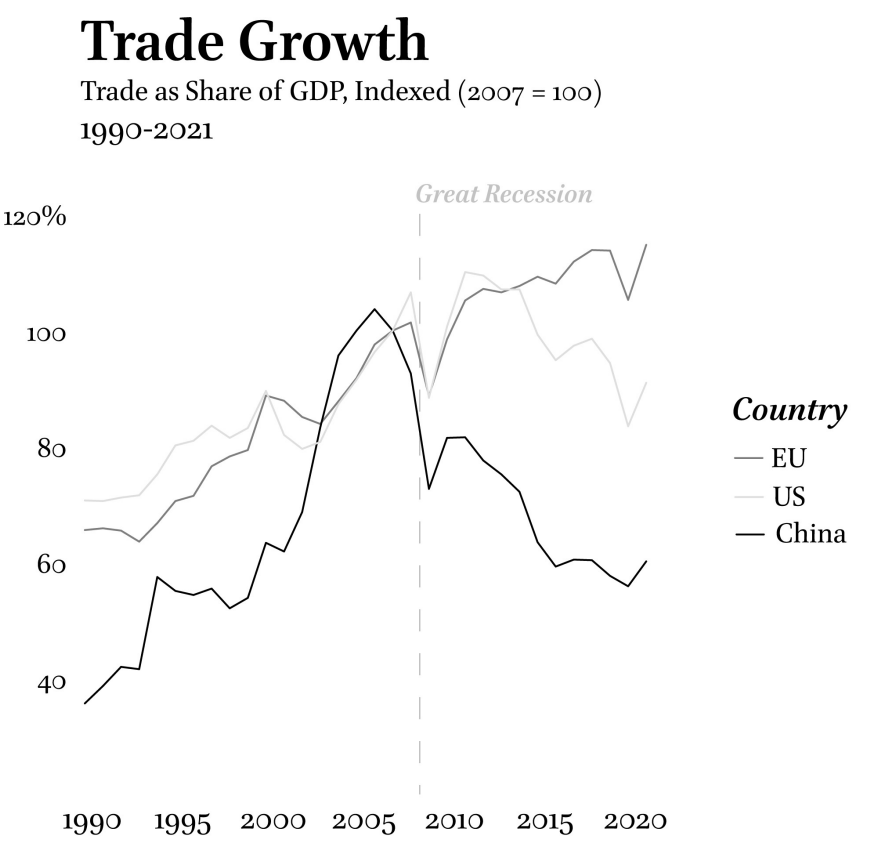
Source: World Bank (*NE.TRD.GNFS.ZS*)

FIGURE 2 World trade as share of GDP, 1970–2022

responsible for the trade recovery after 2022. In China, the impact of the trade collapse in 2008 was especially stark, with declining trade prospects (especially with the wealthy countries) by far the biggest factor in the overall decline in economic growth over the course of the decade.[54] Merchandise exports fell as a share of GDP throughout these years as well, reviving only temporarily under the combined impact of slowed GDP growth and the momentary spike in trade that accompanied the stimulus (Figure 5).[55] By comparison, the EU saw a quick recovery from the trade collapse, driven by especially rapid growth among its internal export engines in Eastern Europe (illustrated by the case of Poland,

54 Lardy 2019, p. 3.

55 In 2020 and 2021, merchandise exports would spike again in line with rising consumer demand associated with the pandemic lockdowns, stimulus measures, and subsequent

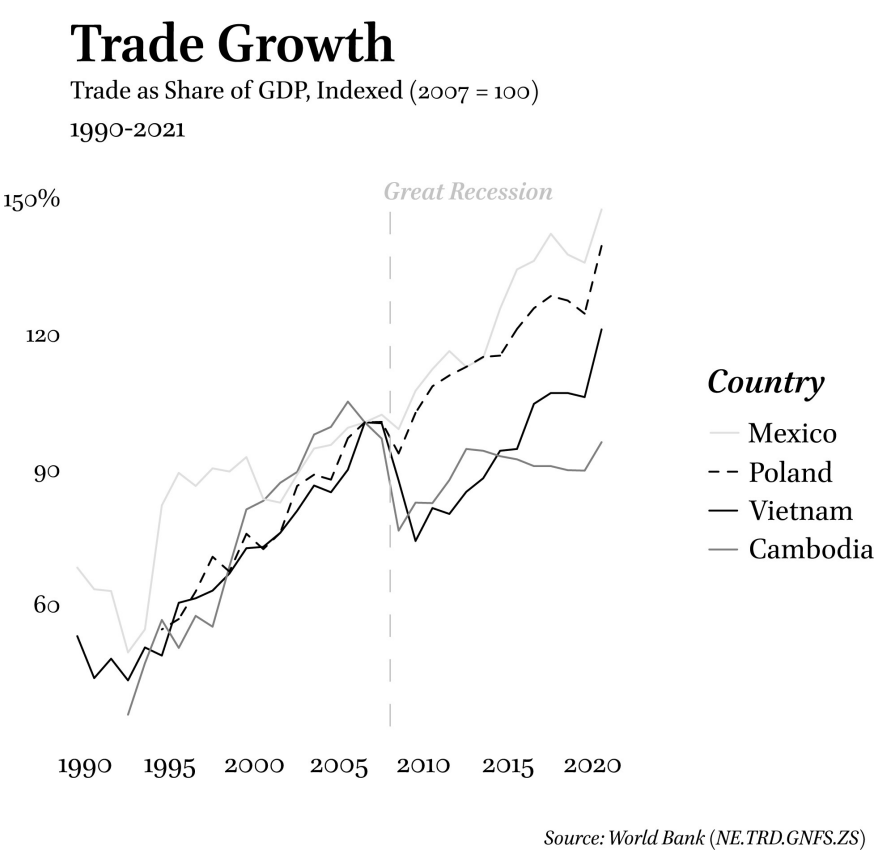


Source: World Bank (*NE.TRD.GNFS.ZS*)

FIGURE 3 Trade Growth, trade as share of GDP, indexed (2007 = 100), 1990–2022, EU, US, China

where trade as a share of GDP reached 118 percent in 2021). Meanwhile, other established hubs such as Mexico saw continuous growth, while newer centres for labour-intensive exports in Asia also saw either a stronger recovery followed by a plateau (illustrated by the case of Cambodia) or an initial decline followed by an unbroken recovery (as in Vietnam, where trade dropped to a trough of 114 percent of GDP in 2010, but had risen to an astonishing 186 percent of GDP in 2021). Overall, the picture that emerges is not one of deglobalisation, but instead a powerful *regionalisation* of global trade.

recovery in other countries, but the growth would prove both mild and short-lived, turning negative again by 2022.

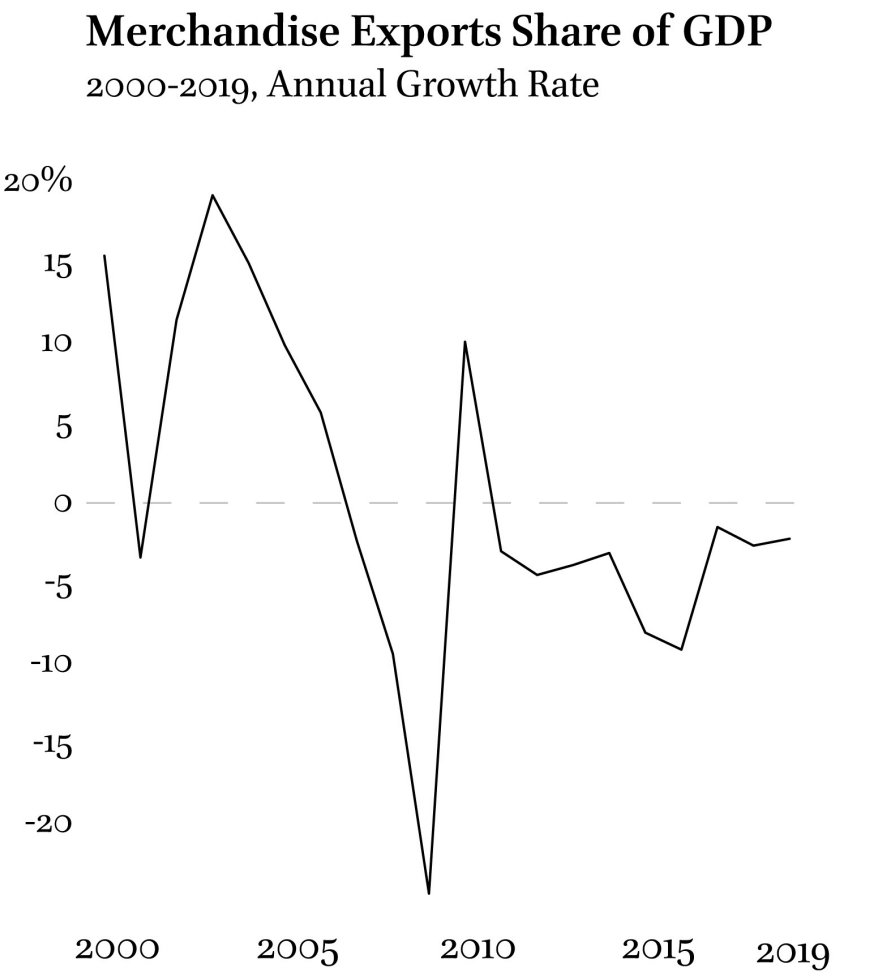


Source: World Bank (*NE.TRD.GNFS.ZS*)

FIGURE 4 Trade growth trade as share of GDP, indexed (2007 = 100), 1990–2022, Mexico, Poland, Vietnam, Cambodia

Within this context, export hubs like the Pearl River Delta have been particularly hard-hit. As the dip in consumer demand from the wealthy countries worked its way through the supply chain in a cascade of cancelled orders, Guangdong recorded over 62,000 firms that had closed or relocated in 2008 alone, with as many as 23 million migrant workers (16.4 percent of the total) laid off nationwide by 2009.[56] Nor do these provincial and national averages give an adequate sense of the local impacts, since unemployment was likely far higher in cities such as Shenzhen, where more than two-thirds of the population were migrants. Similarly, since these cities had large concentrations of exporting firms, they also held a disproportionate share of the total provin-

56 Chan 2010.



Source: World Bank (*NY.GDP.MKTP.CD*), *World Trade Organization* (*TX.VAL.MRCH.CD.WT*)

FIGURE 5 Merchandise exports share of GDP, 2000–19, annual growth rate

cial bankruptcies. The result is perhaps most evident in data on the annual Spring Festival migration. Roughly 10 percent more workers returned home for the Spring Festival in the first months of 2009 than normally left, with many staying longer or not returning at all. In Dongguan, 'hundreds of workers lined up for hours to close their social security insurance accounts (mainly for pensions), their supposed bulwark against poverty and destitution' since these accounts were managed by local governments (and therefore were not

accessible from elsewhere) and the migrants 'had very little hope of coming back to the town.'[57] Ultimately, many didn't. Dongguan's population essentially plateaued after 2010.[58] The industries that remained in the city bifurcated between the stubborn holdouts in low-end manufacturing – concentrated in places like Shipai township, known for its unregulated workshops – and heavily automated factories subsidised by provincial and city authorities.[59]

Shenzhen, Guangzhou, Foshan, Zhuhai and other locales fared better, but only insofar as they were able to successfully reorient around new lines of production, with less profitable firms either shuttering or relocating inland. Shenzhen leaned hard into higher-tech manufacturing, subsidising start-ups and 'maker spaces,' upgrading and automating facilities at 'Foxconn City' in Longhua, using the local stock exchange to attract new tech firms, and working to build out producer services and R&D capacity for established local success stories such as ZTE, DJI, Huawei, Tecno, and Tencent.[60] Guangzhou, meanwhile, had seen its local garment workshops priced out of the urban core well before the outbreak of the Great Recession, with many moving to the border between Guangzhou and Dongguan and others relocating to Panyu District in the city's southern fringe. In their place emerged wholesale trades in both finished apparel as well as bulk fabric and other components. In some cases, apparel wholesaling literally replaced the small workshops that had sprung up in the city's urban villages, as in Lujing and Kangle villages near Sun Yat-sen University, where shops selling fabric or other garment components such as down or zippers gradually replaced workshops making finished garments. Similarly, the various villages in and around Guangyuanxi Road and Xiaobei Station (both in Yuexiu district) had become home to China's largest populations of African migrants, many of whom were wholesale traders purchasing bulk apparel for export back to their home countries.[61] Each of these commercial centres also existed in close interdependence with newer wholesale complexes implanted atop demolished portions of the old urban village or located in the city's northern and southern suburbs, often on sites that had once hosted textile factories.

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57 Chan 2010, pp. 666–7.

58 Li and Du 2019.

59 Orlik 2020, pp. 141–5.

60 Bland, Ben 3 May 2016 'Shenzhen, China, a Silicon Valley of hardware', *Financial Times*. https://www.ft.com/content/2c38ccb8-0ad8-11e6-b0f1-61f222853ff3

61 This would also add a distinct racial character to urban revitalisation efforts in the city throughout the decade, as documented by Huang 2018.

PHOTO 2 New, formal wholesale facilities in Kangle village (exterior)
AUTHOR 2024

As the decade went on, even these areas were placed under constant threat of demolition as the city sought to reorient itself more exclusively around capital-intensive sectors, high-end services, and the culture industry. Those aligned with domestic ecommerce monopolies fared the best, integrating the remainder of atomised workshops into complex and hyper-flexible logistics networks serving rapid-fire consumer demand. In villages like Kangle, lower-end wholesalers persisted in the narrow alleyways while thousands of higher-end wholesalers moved into the bright new market complexes erected along the main road. Both bought textiles in bulk from factories in Zhejiang and Jiangsu and sold to garment firms that had since relocated to the interior or even overseas. By the early 2020s, however, the lower-end firms had begun to see their business throttled as rising ecommerce platforms enabled customers to find better prices elsewhere. Then, in 2023 and 2024, another clear-out occurred in the wake of the pandemic. Factory closures were again concentrated in the Pearl River Delta and again mostly affected lower-end industries. Eviction notices were again placed on the walls of urban villages that had been targeted for demolition a decade prior. Time twists back on itself. Returning to Kangle in 2024, the clean, air-conditioned trade complexes had eaten away at the neighbourhood but not quite consumed it. The old city still sprawled in the shadows. Although business had slowed, the money continued to trickle in and

PHOTO 3 New, formal wholesale facilities in Kangle village (interior 1)
AUTHOR 2024

PHOTO 4 New, formal wholesale facilities in Kangle village (interior 2)
AUTHOR 2024

PHOTO 5 Older shops and wholesalers in the alleyways of Kangle village
AUTHOR 2024

the owners of the alleyway shops stated the same anxieties as they had in 2014, fearing eviction next year, or a year after that, listing out the places they might relocate to when the time finally came.

4 Hinterland and Metropole

While the exact path taken depended on each area's inherited amenities and their artful exploitation by local planners and corporate executives, the general geographic pattern that resulted is a familiar one, wherein the character of a space is defined first and foremost by its proximity to the administrative centres of accumulation. The first spores of the planetary factory to take root in China settled in the small cities and market towns host to the early special economic zones. In the Pearl River Delta, rudimentary factories soon sprung up around the port complexes in places like Shekou, within Shenzhen's Nanshan District, or at key border crossings, as in nearby Luohu District. As time passed, however, these factory complexes gave way to office buildings and financial centres. Futian, wedged between Nanshan and Luohu, became the site of Shenzhen's Stock Exchange, which acted as the anchor for the budding Central Business District that today hosts the headquarters of many of China's largest

finance and tech firms. In Guangzhou, a similar process took place – albeit one channelled by the older and larger urban centre's pre-existing infrastructure – with various clusters of high-end production and producer services emerging in places like Tianhe District, where Xian village was located. In each case, the pattern that took shape was the emergence of various urban cores defined by their concentration of producer service firms, knitting the region together into an increasingly global city.

These new administrative cores were then encircled by a near hinterland of industrial suburbs, with rapidly growing firms relocating from now-expensive districts near borders, rivers, or coastlines to cheaper greenfield sites able to host sprawling industrial facilities in rural counties that had once been a meshwork of paddy fields and marshland. Despite the profits from the region's industry being siphoned into the new financial cores, this suburban hinterland would remain the real centre of accumulation. After all, for every deal inked in the downtown office towers, the factories were still the site where the contract actually had to be met. The exact size and layout of administrative centres and their supporting suburbs vary across the Pearl River Delta, and even more across the Greater Bay Area, which includes Macao and Hong Kong. In Guangzhou, a relatively large and cohesive urban core has grown up roughly around the city's historic centre, with some less formal commercial activity still taking place in districts like Yuexiu but most production pushed out to the periphery, especially near the airport in Baiyun District in the north, Panyu in the south, and eastward toward Dongguan. In Shenzhen, the rapid unfolding of built space would see several centres of accumulation emerge more or less simultaneously, giving the city an exploded character with iterative business districts often scattered in close succession. As time passed, more intensive production spread north into greenfield suburbs such as Longhua and Longgang and east toward Yantian and Pinggan. Dongguan, by contrast, has always been something like a near hinterland city for both Guangzhou and Shenzhen, with only a few small centres of accumulation encircled by factories and worker housing. Other centres in the delta followed similar patterns, each marked by a certain local flavour – such as Foshan's historic downtown in Chancheng paired with its near hinterland specialising in appliance production in Shunde – but all were examples of the same geographic relationship.

As one gets further from the core urban agglomeration, the interknit clusters of industry and residential housing grow more dispersed. Guangzhou's Conghua District, for example, includes several exurban clusters but is mostly known for its agriculture.[62] Travel further and you enter into rural Guangdong proper

62 The size and scope of urban administrative units in China is, on average, more expansive

and, further still, into the far hinterland of neighbouring provinces like Guangxi, Hunan and Jiangxi. The pattern is essentially fractal: while these poorer interior provinces include their own poor rural peripheries and relatively wealthy urban centres, some of which are major administrative hubs for accumulation in their respective regions, few even begin to approach the global roles played by the central business districts in the coastal metropoles. They also have larger rural populations, on average, and this far hinterland in the interior has therefore been marked by almost continuous outmigration. Though some migrants were funnelled to major inland urban centres like Chengdu, Chongqing, Wuhan or Changsha, and others attracted to smaller, lower-tier cities closer to home (especially in more recent years), the bulk of migration has still centred on the megapolitan agglomerations on the coast. Thus, the rural counties of the interior have long been forced to play a role similar to that of sacrifice zones in other parts of the world, exporting goods from increasingly mechanised primary sectors, compelled to host the least desirable and most heavily polluting industries, and often left dependent on fiscal support from higher levels of government due to the extreme poverty and high unemployment rates for those who've had no choice but to remain.

The most extreme examples could be found in both traditionally poor landlocked regions such as the mountainous southwest, and in the old northeastern rust belt, which never recovered from the gutting of socialist-era industry. After the Great Recession, however, some of these hinterland areas – and especially the largest and most competitive of the interior cities in central China, such as Chongqing – would secure their role as new centres for national manufacturing, where productive industries shed from the coastal hubs could be relocated (and often reoriented toward new end markets), followed by the emergence of (albeit smaller) cores of accumulation in new business districts. Similarly, many historically poor provinces would find themselves taking centre stage in national poverty alleviation efforts. For example, in Guizhou, GDP doubled and nearly 10 million were lifted out of extreme poverty between 2012 and

than similar administrative units in the US or Europe. One especially important difference is the fact that centrally-administered cities (直辖市) such as Beijing and Shanghai, sub-provincial cities (副省级市), including most provincial capitals, and prefecture-level cities (地级市) are all larger-order units lying above the county-level units, which include 'Counties' (县) in rural areas and 'Districts' (区) in urban areas. Thus, many so-called 'cities' include large agricultural stretches alongside their built-up areas, with separate designations for the actual urbanised area. In extreme cases, such as that of the centrally-administered city of Chongqing – which is in effect a small province – the actual built-up area is a small portion of the total and the majority of the land area is actually rural.

2022, at least in absolute terms.[63] The effort was visible in a massive buildout of new highways, housing, and other infrastructural amenities, accompanied by attempts to reorient the economic base away from extraction and toward eco-tourism, bioprospecting, and data centres. Altogether, however, increasing connectivity and reduced poverty have resulted in a general concentration of population into urban centres like Guiyang, leaving local governments elsewhere with heavy debt burdens and clusters of 'green' and 'digital' industries that produce little in the way of employment.

Even where successful, the shift to a new industrial base in both the metropole and the hinterland was never simply the result of enlightened administration on the part of local, provincial, or central authorities, nor smart corporate strategy on the part of manufacturers. On the coasts, the process had been a tumultuous one, with widespread strikes and riots in factory districts and urban villages both responding to and further incentivising factory relocations and urban demolition efforts (see Chapter 3). In some cases, these class conflicts won limited success. But they were almost exclusively defensive battles fought to win final payouts, stop mistreatment, or secure back wages, rarely demanding substantial pay increases and almost never getting involved in political issues. They were most successful in cases like that of Xian village, where the interest groups making demands were small-scale landowners or businesspeople able to leverage claims of local corruption and assert their property rights, all in line with the letter of the law.[64] They were least successful in cases like that of Xintang town, a manufacturing district on Guangzhou's edges specialising in denim production, which saw widespread rioting in 2011 after a migrant street vendor was beaten by police. Unlike in Xian village, the Xintang riot was simply suppressed by police, with mass arrests followed by a rapid resumption of work.[65] Even some of the most significant workplace struggles, such as the 2010 strike at Honda's Foshan facility, or the 2014 strike at shoe manufacturer Yue Yuen's Dongguan factory, often only made limited

63 China's official poverty measures follow the questionable standards used by agencies like the World Bank, which do not focus on actual purchasing power or access to a decent standard of living but instead on nominal measures of income. Such measures tend to exaggerate real gains, since they do not properly account for inflation in key goods. For an overview of the problem, see: Moatsos, Michail 2021 'Global extreme poverty: Present and past since 1820', in OECD (Ed.), *How was life? Vol. II: New perspectives on well-being and global inequality since 1820*, Paris: OECD Publishing. pp. 186–212.

64 Similar protests over property rights would become more common in the latter half of the decade. See: Chuang 2019b.

65 For a detailed overview of the riots and strikes in the late 2000s and early 2010s, see: Chuang 2016b.

demands, with strikers returning to work as soon as management promised partial concessions.[66] Overall, such unrest certainly exerted some influence on the increase in labour costs, though likely less than other factors such as inflation in consumer goods or rising land prices.

The impact, however, was clear. Many parts of the Pearl River Delta saw a real decline in the number of manufacturing firms, with this decline concentrated among foreign firms producing for export. In Shenzhen's eastern Yantian District, for instance, there had been over 400 foreign firms in 2001. By 2013, that number had declined to a mere 150, since 'higher labour costs, a dearth of available land, and weaker export demand in the wake of the great financial crisis drove some into bankruptcy; others to cheaper locations.' The total population of migrant workers in Yantian was cut in half and 'the factories that remained faced lower profitability.'[67] Interior cities then scrambled to compete for the relocated industries. Some areas won spectacular victories in these local bidding wars. For example, when time came for its next major expansion, Taiwanese contract manufacturer Foxconn chose Henan's provincial capital Zhengzhou. The new 'iPhone city' complex in Zhengzhou would overtake the company's Shenzhen facility (which was subsequently mechanised and downsized) as the world's largest smartphone factory. Henan had previously been famous as one of China's breadbasket provinces and, when the new Foxconn facility opened, it would largely draw its workforce from the surrounding rural hinterland.[68] In many cases, however, this seemingly minor shift away from long-distance migrant labour to reliance on local workers or those from nearby rural areas actually posed a more significant hindrance for businesses, since these workers often held local *hukou* (giving them better legal protections than migrant workers) and retained their family and farm responsibilities, even demanding time off during agricultural harvests.[69] Just as often, then, industrial firms moving out of the coasts chose to instead relocate overseas to new production sites in South and Southeast Asia, all of which had lower labour costs than the Chinese interior. Shortly after the Foxconn facility opened in Zhengzhou, the company opened a series of smaller plants producing other Apple products in India and Vietnam. In recent years, Xiaomi, Huawei, Samsung, and others have followed suit.

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66 Schmalz et al. 2017.

67 Orlik 2020, p. 105.

68 Barboza, David 29 December 2016 'How China Built "iPhone City" With Billions in Perks for Apple's Partner', *The New York Times*. https://www.nytimes.com/2016/12/29/technology/apple-iphone-china-foxconn.html

69 Deng 2014; Dong 2022.

Meanwhile, domestic industry was repurposed to serve both the domestic market and new end markets outside the high-income countries. Where firms did successfully relocate to the interior, they were not simply rebuilding the same export-oriented facilities in a new site but instead expanding within new supply chains that often also supplied domestic consumption or other 'emerging markets' in Asia and elsewhere.[70] Again, the 'great trade collapse' was not so much a period of deglobalisation as a new regionalisation, during which supply chains were restructured as end markets diversified away from the high-income countries.[71] The position of Chinese firms underwent a subtle shift within these new regional supply chains, as did the cost calculus for foreign firms investing in the Chinse interior. Many Chinese companies were now consolidated enough to open their own facilities in cheaper production sites in Vietnam or Cambodia.[72] Similarly, while higher-tech foreign firms like Foxconn or HP may have seen continued benefits in relocating to the interior, lower-tech firms (or even lower-tech segments of the same transnationals) often found it more lucrative to relocate to places like Pakistan or Bangladesh. In all cases, the underlying pull factors were the same: as early as the 2000s, Unit Labour Costs in China had ascended above those in neighbouring Southeast Asia but, by the 2010s, they began to accelerate even further, approaching those in the US and seeing the relative costs of production in Southeast Asian countries drop to between one third and one half of those in China.[73] Thus, while many factors contributed to slowing economic growth over the course of the 2010s, by far the most central has been the declining importance of exports to the high-income countries and the subsequent evolution of China's trade balance.[74]

5 Mutilation

What appears as urbanisation and industrial restructuring is, at root, a reshaping of humanity. On that small plot of squatted land in Guangxi province, those who stayed had all crowded into the ground floor of one of the partially demolished towers, extending tarps out from the yawning hole in the wall along a makeshift wooden frame to keep out the wind and cover the fireplace where the big pot bubbled between us. The upper stories of the tower were inac-

70 Zhu and Pickles 2013, pp. 36–63.
71 Gereffi 2018.
72 Yang 2016.
73 Yang 2016, p. 5, Figure 1.
74 Lardy 2019, p. 3.

cessible. When the residents had first refused to vacate their apartments, the developer had sent demolition crews through each building. The crews forced families out, hurled their furniture through the windows, smashed openings in the ground floor walls and used backhoes to scrape out the stairwells. After this, many residents grudgingly left, but a small handful had remained, camping together on the first floor of one of the towers, their bedrolls laid out in spaces cleared between piles of smashed brick and shattered tile. The outsides of the buildings were pasted with big-character posters protesting the eviction and news clippings that detailed central government policy about land compensation. In every discussion, the squatters emphasised that local officials were clearly out of line with central policy. They'd sent a formal petition to the state agency tasked with hearing complaints but hadn't received a response.[75] Even while they asked that we not take pictures of their faces for fear of reprisals, they also hoped that publicity would draw the attention of some upright official who would get the higher authorities to step in and rectify the situation.

Whether or not the squatters truly believed the central government had their interests in mind did not matter. So long as they played the game and aimed their protest at local officials, they could hold out hope that higher authorities might come to their aid. But behind the appeals lay a deeper cynicism. Most who remained were older individuals born and raised in the waning years of the socialist era. Too young to have seen the revolution or the early years of hope that followed, they were instead children of its ossification. Those slightly older than them had been the last generation to secure the full range of social benefits associated with industrial employment. But this generation was too young to have ever had those jobs in the first place. Instead, they were born to a broken promise. Reaching adulthood in the frantic, early years of integration with the capitalist world, theirs was the first real generation of waged employment and migrant labour. It was also the first generation of pillage, as the managers of the old system used their technical expertise and political power to grow into the first crop of capitalists. At the same time, the squatters' generation bore witness to one of the most rapid bursts of economic development in history. In fact, they'd done more than bear witness – they'd borne the boom on their backs, shed their blood for it, left trails of sweat across China like bitter rivers running into those same coastal deltas where the new cities rose. The squat was

75 Petitioning as a form of protest (信访) has a long history in the region. Today, the central state tasks the National Public Complaints and Proposals Division (国家信访局) with hearing complaints from the people. The modern evolution of the practice is documented in: Hung 2013.

a last, desperate attempt to cash out on the plunder, as so many others around them had. But if development did, in fact, guarantee a better future, it was still only a future. Something for their children's children. For them, development was a long march through fields of rubble.

For younger generations, the transformation was even more thorough. The urbanisation of China was merely the most prominent feature of an even greater enclosure advancing across the entire planet, eliminating the last vestiges of a true subsistence peasantry and thereby throwing the vast majority of humankind onto the mercies of the market.[76] In most places, this was simply the final stage in a long process of increasing market dependence, definitively dispossessing the population of any means other than money to ensure their survival, but also giving them little access to work – in other words, the majority of entire national populations were converted into a stagnant reserve of surplus labour, thrown into precarious lives of informal work and tenuous sharecropping, and saved from starvation only by the thin buffer offered by the tattered remains of subsistence agriculture and new forms of non-market gleaning.[77] Those in China, however, had the dubious fortune of being cast from the countryside straight into the forge of the planetary factory. While there is little to idealise about peasant life, the proletarian condition is a special kind of mutilation, with workers given just enough intellectual and material development to understand what they are being deprived of, as scant paychecks are quickly spent and lifetimes lost to monotonous labour. The tragedy here is not simply one of absolute immiseration (though for many it is this also); it is instead found in the ever-widening gap between, on the one hand, society's potential to care for people's needs, provide them with every material necessity, and promote a more general immaterial flourishing, and, on the other, its complete and utter failure to do so – a failure that is only aggravated as the capacity to achieve such things grows, with every real scarcity displaced by worsening artificial scarcities in essential goods and forms of care. In other words, it is a tantalising torture, in which the benefits of development are immediately evident and yet always just outside arms reach.

Left in the abstract, it's easy enough to grasp the general trend and maybe gain a certain intellectual sympathy, but true understanding is felt in the gut – here maybe best described as something like an expanding hollowness, or the anxious heaviness that quivers as a sea of worry sitting just under the heart. After all, these conditions are by no means something unique to the dismal

76 Araghi 1995.

77 This rise in 'global unemployment' is detailed in: Benanav 2015.

factories of Asia or the far-flung slum cities of the Global South. They are ambient. They are our own lives, governed by the endless, disciplined spoilage of time. On one humid evening in the early fall of that same year I found myself with a friend wandering through the bustling night markets in the city of Kunming, the provincial capital of mountainous Yunnan province. Aimless, we were drawn out by that simple, anxious yearning that one feels at the turning of the seasons, like the sensation of falling through the world, maybe, or the grim presentiment of some great loss to come that, many years later, you realise is in fact the inkling of a loss that had already passed unknown in the darkness. We chatted with the migrant vendors, telling them where we were from and asking the same, our stories intermingling in the cumin-laden smoke of streetside grills. I talked of dark mountain valleys cut by violent rivers, of dying languages, dying industries, dying farms and forests – and they spoke of the same, stories weaving tightly in the soft orange light. Then, of course, the threads peeled off in their divergent paths. Cheap feature phones chittered with blinking LEDs. The vendors spoke of hopes for their children in the city, the great distance already climbed from a peasant past. The picture I painted of the American wasteland was met by a deeply cynical but nonetheless earnest belief in progress, not at all blind to the brutal realities of demolition, corruption, and profound inequity but nonetheless recognising that basically everything was better now than in the past. This wasn't the Chinese Dream stoked among the rising middle classes, but it was at least a begrudging recognition that the tide of wealth was rising, even if they themselves sank.

Eventually we found ourselves squatting on small plastic stools around a kebab stand with a group of second- or third-generation migrants, many of whom had been 'left-behind' children raised by grandparents or slightly older siblings in villages emptied of adults before taking leave themselves, often as early as possible. Now in their late teens and early twenties, they had already worked in cities across the coast or in the ascending regional hubs of Chongqing and Chengdu, where their youth and lack of education ensured that they could only find precarious piecework jobs in the worst grey-market industries where bosses paid no heed to the legal minimums of age or wage. They described this work as nothing short of torture: 14-hour days of a single monotonous motion sorting small metal parts, hand-punching plastic components out of moulding frames, holding vials up to an automated nozzle spraying perfume, falling asleep on your feet, passing out from the chemical fumes, losing your first finger on the day you turned eighteen. But having no work was also a torture of cashless hunger, sleeping on street corners only to finally wander back to the corner where labour contractors came to find people for the lowest paid and least legal temp jobs, knowing that 14-year-olds with fake IDs couldn't

report the workshop for labour violations without being sent back 'home' to the hollowed countryside. In many places, their very presence had been met with scorn, their rural accents mocked by the better-off, every neighbourhood they lived in threatened with demolition, their entire lives treated as little more than urban blight. In other words, they'd been scraped into the cities, the last dregs of the once-mighty sea of rural labour quaffed by the great export engine, only to meet the ire of the rising middle class and be barred from even the steady suffering of formal factory work available to elder migrants, where one could at least earn some savings and get a modicum of technical training to barter elsewhere for better pay.

There was little choice but to embrace the blight. Though I would only realise it later, several of the migrants were *shamate* ('smarts,' sinicised as 杀马特), a fact given away by their internet-inflected fashion sense and bizarre hairstyles, which resembled something like an anime-amplified version of the early-2000s emo aesthetic – overwrought outfits gleaned from local *shanzhai* knockoffs of occult streetwear and shirts from Hot Topic, their aggressively dyed hair swooping over one eye, fingers and necks laden with loud plastic jewellery, and faces plastered with glam makeup mined from goth and Japanese visual kei styles. But everything about the look was also somehow more extreme, more desperate, their hair cultivated to almost float above the head, each signifier mined from global subcultures amplified by the scene's proliferation on archaic-looking web forums and QQ video chatrooms, as well as its widespread use of bedazzled flip phones complete with a localised rawr xD web dialect and MySpace-background image filters. Their affect was also familiar, though it was entirely unlike that of the middle-class scene kid. Instead, the attitude was something like a hybrid of the DIY crust ethic and the found-family, fuck-you spirit of the Juggalos, all fused together in a *déclassé* cybergoth subculture of bad dancing and nauseating neon. Overall, the phenomenon was short-lived, born in the late 2000s and slowly dissolved over the course of the 2010s. But by the latter half of the decade, the subculture would accrue increasing amounts of media attention. Though often voyeuristic, many accounts also attempted an earnest inquiry into the lives of these youths. Foremost among these was a major documentary by director Li Yifan, which collated digital records from the *shamate* era (including numerous videos of factory drudgery) and combined them with interviews from ex-*shamate* across the country. One interviewee captures the basic sentiment: 'Everyone else thought we weren't normal, but we could still persevere because we were a family. As long as you were *shamate*, you belonged to all of us.'

While the subculture spanned city and countryside, it was defined by the brutal constraints of factory life. As Luo Fuxing, one of the scene's leading fig-

PHOTO 6 A group of Shamate interviewed for Li Yifan's film on the subculture UPLOADED BY DOUBAN USER LUO FUXING [罗福兴] ON 15 FEBRUARY 2021, HTTPS://WWW.DOUBAN.COM/PEOPLE/168089197/STATUS/3302081542/?_I=3842829GK1TMGK

ures, described the experience of work in the industrial districts: 'It feels like you're living in a cage. You don't know what's outside, you don't know anything.' Often, the best escape for *shamate* was finding work in local hair salons. The group that we met had even been able to open their own salon in Kunming, though rising rents made it unclear how long their business would survive. After chatting and chain smoking at the streetside barbecue, we all decided to make our way to the local 'disco' to celebrate the birthday of one of their friends. In those years, lower-tier cities across the interior tended to have a clear class hierarchy built into their nightlife. At the apex were 'clubs' where the nouveau barely-riche could pour cash into overpriced bottle service at private tables as they were bombarded with strobe lights and the loud mediocrity of the live DJ, with everything clearly modelled on some generic, globalised image of the Jersey Shore. At the bottom were small bars where old men could pay young women for a sad slow dance to bittersweet love songs from the early years of the economic opening, mining their nostalgia for a life that never came to pass. The 'disco' sat somewhere in the middle, alongside the proliferation of local roller rinks. Catering to poor students and the working class, discos usually had a bar and a central dance floor, but also private tables that could be rented, topped with 15–20 beers, with cakes and champaign available on order for special celebrations. At the bar, women hired as 'honeybees' were paid to flirt with patrons, encouraging them to dance and drink.

We pooled cash for a booth and ordered a huge cake, howling 'Happy Birthday,' first in Chinese and then in broken English as ash from untended cigarettes collected on the table. Barely able to speak the language at that point, fluent friends offered me hurried translation of the rapid-fire conversation – workable on the street, but quickly eroded in the noise of the bar – and soon the drunken pace had left me far behind, the words whirling in a raw sensory mass, unintelligible. Mute, I followed the fragments of the group breaking off to the dancefloor, where indecipherable music pounded through a hurl of anxious bodies and swirling smoke. Half mosh pit, half high-school dance, minor scuffles broke out and were quickly swallowed by the mass. Meanwhile, the familiar drugs circulated on the periphery – here as at home in the rural US west these were meth and ketamine, easily mass produced in black market chemical factories. The air had the same substance as at any end-of-the-line punk venue, muscle memory kicking in from the miserable little circle pits that once churned in ramshackle house shows along California's lost coast, the northern edges of the Central Valley, the timbered stretches of southern Oregon.

Returning to the booth, the cake had finally come and everyone was digging into the spongy mass with bare hands, frosting smeared across bloody knuckles and drunken smiles, sugar melding with the taste of cigarettes. Soon hunks of it were hurling across the table and then further to the dance floor, cutting arcs into the smoke. Dancers slipped on the pale frosting and new fights radiated out from every impact, each birthing more conflict on its own edges in the networked shape of spreading disease and spiralling madness. Bodies wrestled in the sugar scraped to grit, teeth flashing. There's a certain feral affect that takes root in loss, an ache that blooms from emptiness like a lotus from the mud. I once knew a group of dirtbag kids who liked to take their little '80s Honda on our winding country roads, the driver would strap the seatbelt tight over his sleeveless Sepultura shirt and see how fast he could take the turns, each winding more tightly than the last until the car finally flipped door over door into the alfalfa and mud, everyone laughing and screaming like they were on a ride at the county fair. Then they'd unstrap themselves, kick open the door, deadlift the tiny car upright and drive home. There is no word for this feeling. We plummet, chests empty. Anointed blood pours black down void and vein. Eventually the staff turned on the lights and forced everyone out in a flood of bodies, blood beating humid in the brain. By then the alleyway outside was blindingly black, the market shuttered, and the streetlamp shattered, like a lightless pit encircled by the orange glow of the city of the damned – its lowest lamentation, where pale hands claw sugar-coated rubble, raging against the great tide that raises cities and then forgets. Flames sparked from lighters like eyes opening.

CHAPTER 2

Crust of the Earth

Looking out on the rubble, it's easy to see only rubble. Many of the narratives we hear about China are brimming with the hyperbolic ruin of human suffering – the stories of quelled dissent and prison cities where facial recognition cameras perch at every stoplight, sweatshop tales of limbs lost or lives bled out into the assembly line, and of course the many portraits of those like the squatters who have made a home in the ruin. But it's also easy to look out on the glittering skyline of an adolescent megacity and pretend it cascades out in all directions, bright and new. After all, China is one of the few places in the world where, despite all the costs of rapid development, almost every aspect of life has undeniably and quite visibly improved for the average person in a very short span of time. If anything, this more hopeful view has become an increasingly common image of China: the glowing planetary metropolis blooming green over Asia and Africa, laying roads and railways, digging deepwater ports, uprooting poverty, and generally prefiguring a new sort of 'ecological civilization' tended by a benevolent, consultative government helmed by enlightened engineers.[1] There are always two aspects to these orientalist myths – the one perilous, the other romantic. Much more difficult is reaching through the shroud of glitter and collapse to grasp the writhing body of the cement serpent in its entirety, feeling out exactly how the sharp, splendid scales of glass and steel run up from the underbelly of rubble beneath. Demolition as development and development as demolition: a seething ouroboros of fresh cement encircling the earth.

But even at its most concrete, the true beast evades our grip. What we can feel out at any given moment as its fixed, skeletal structure – the characteristics of urbanisation and proletarianisation in China, the basic geography of industrial location, the particular power structure of supply chains – are not only in flux but are, more fundamentally, an excrescence left by fluid social forces coursing through the body of the beast, themselves governed by distinct laws of motion not easily legible in the roads and factories that mineralise on the social

1 The term 'ecological civilisation' (生态文明) was coined in the Soviet Union in the 1980s and first popularised in China in the 1990s by agricultural economist Ye Qianji and the director of China's environmental protection agency Pan Yue, before spreading into official use by the highest levels of the state during the Hu-Wen administration in the 2000s and finally incorporated into Chinese constitution in 2012, with ecological goals built into subsequent five-year plans.

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system's surface. Each bit of infrastructure is itself an aliquot part of that great mass of commodities seething over the seas and continents, swarming through the skies and the screens with such choking abundance that it clouds our view in swirling economic abstractions. In fact, the cloud is not quite a metaphor. Take, for instance, the slow-seething storm of climate change, with approximately 43 billion tons of anthropogenic CO_2 dumped into the atmosphere each year stirring into hurricanes and heatwaves. Or the more literal cloud of Nitrogen Dioxide (NO_2), one of the most common air pollutants, emitted in a wide range of industrial processes and spewed out daily from billions of internal combustion engines. Measurable via satellite, tropospheric NO_2 has been used as one of the key remote sensing proxies (alongside nightlights) to track economic activity in the absence of reliable data.[2] Images of tropospheric NO_2 are therefore maybe the closest we can come to a portrait of the emergent, alien body of capital as 'real god,' which can be captured in no icon. The measure renders the planetary factory as a sort of heat map, with clouds condensing over the regions where the forge of mass production burns most brightly.[3]

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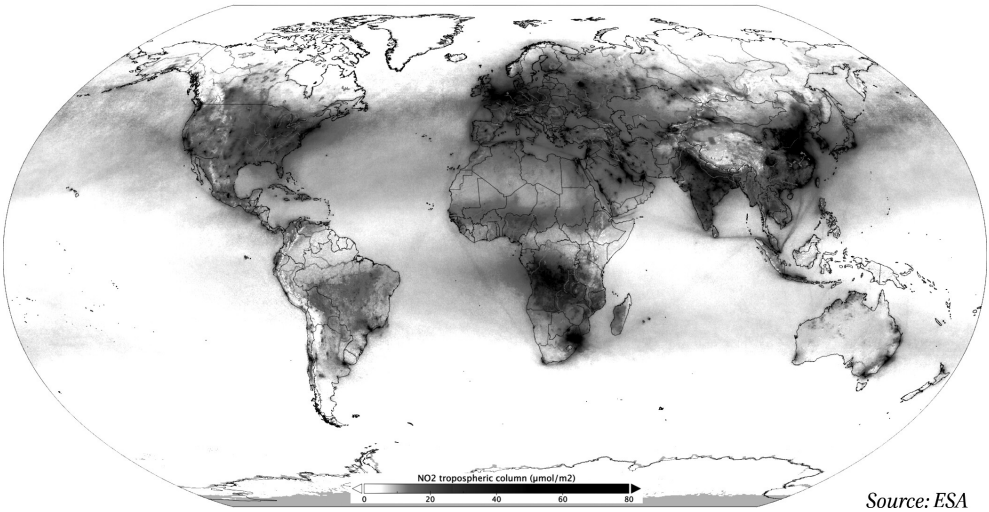
2 As with many remote sensing techniques, this is not necessarily a direct measurement of ground-level NO_2 concentrations but instead the 'total column density,' which measures the number of NO_2 molecules in a vertical column of air within a unit area from the ground up to the satellite and then extrapolates tropospheric concentrations based on this density. Similarly, as with all remote sensing, the unit area resolution differs depending on the tool. The highest-quality and most comprehensive public data is available from the Tropospheric Monitoring Instrument (TROPOMI) on the Copernicus Sentinal-5 Precursor satellite, launched in late 2017.

3 It is important to note, however, that NO_2 emissions do not scale linearly with GDP *between* countries since they are more closely linked to industrial output. While NO_2 tends to be amplified in coal-burning areas (as well as by large biomass burns, as in wildfires or the widespread burning of crop residues) and has successfully been reduced in many countries due to environmental regulation, it has nonetheless proven an accurate measure tracking industrial activity even in high-income countries with stringent air pollution standards and where the bulk of GDP is attributed to the service sector. In the period from 1996 to 2017, NO_2 emissions in Northern Italy's Po valley, for example, closely tracked conventional economic measures of national output. When the great recession in 2008 and the debt crisis in the early 2010s caused Italian GDP to drop (by 7.9 percent between 2007 and 2009, and 5.2 percent between 2011 and 2014), the variability of NO_2 emissions also dropped by as much as 80 percent over roughly the same period (2007–2013) (Bichler and Bittner 2022). Similarly, numerous studies have used NO_2 measurements to try and track the severity of the economic decline associated with the outbreak of the COVID-19 pandemic in 2020, especially in areas with poor data (Cooper et al. 2022). Not only do such emissions seem to accurately track industrial activity, the data also do not show any strong indication of an 'environmental Kuznets curve,' wherein air pollution would decline with rising output. Instead, NO_2 measurements simply show the reality that the most intensive industrial processes have been relocated through offshoring, with little change in the overall trend (Han et al. 2021.).



MAP 5 Global annual average tropospheric NO_2 concentrations, 2018

Looking at a global map of averaged NO_2 emissions for 2018, as in Map 5, we can clearly see the basic shape of global industry. While at first the cloud of NO_2 seems to merely track human population (which it obviously does to a certain extent), it's also clear that emissions diverge from population density in a number of places – Ethiopia, the Lake Victoria area, and Southern Mexico, for example, all have higher populations than their emissions seem to indicate, while the DRC, Angola, and Zambia all show much higher emissions than their population. In fact, transoceanic shipping routes are even visible, in most cases appearing as a pale fog lying over the major transit areas (as in the South China Sea, the Red Sea, and the Gulf of Mexico) and as discernible strings of NO_2 traced in long arcs where global logistics routes narrow (as in the route from the Malacca straits to Sri Lanka or the dimmer one tracing southward to Mauritius, Madagascar, and South Africa). What NO_2 emissions actually show, then, is not so much factories belching pollution or coal-fired power plants (though these are certainly visible), but instead the more general combination of industry, agriculture, and human activity. Emissions are strongest not simply in areas that have high output of crucial industrial goods, but specifically in those where that output is facilitated by the mass movement of labourers on a day-to-day basis, which also implies a visible impact on the surrounding environment that may or may not be picked up directly in the NO_2 column (in the form of wildfires, slash-and-burn deforestation, the operation

of agricultural machinery, or the burning of crop biomass such as straw). Thus, we can clearly see the result of mechanisation and industrial offshoring, with the US relatively light despite its high GDP, and global industrial activity concentrated in a few major zones committed to labour-intensive extraction and manufacturing.

Three major extractive cores are visible by proxy, one in Shanxi in China, and two in Africa: one spans the southern DRC (major producer of cobalt, tantalum, tin, and tungsten), northern Angola (China's largest oil supplier) and western Zambia (a major copper producer); with another in South Africa (the world's largest producer of chrome, manganese, platinum, vanadium, and vermiculite) which is only visible because it is fused with the industrial core in Gauteng province around Johannesburg, powered by a number of coal plants. But NO_2 concentrations are not as high in the more mechanised mining areas. Again: these emissions do not so much track the extraction process itself, but instead the specific combination of human movement and habitation alongside industrial activity, with associated energy infrastructure and active clearing of land. While NO_2 can track certain extractive infrastructures with high accuracy (such as particular gas pipelines), the planetary mine is only visible here by proxy. The cluster on the DRC and neighbouring areas in 2018, for example, is not primarily due to mining or petroleum extraction, but is instead caused by the slash-and-burn agrarian settlement that has accompanied booming population growth, and which often spills over into massive wildfires.[4] Extractive industries are obviously connected, however, both via the relationship between agriculture and deforestation and because the local demographic increase that followed the Congo Wars – and the mass displacement of population – has provided cheap and abundant labour to the mining sector.[5] Inversely, this is also why older and more heavily automated extractive centres in places like Canada, Australia, or Chile hardly register.

By contrast, manufacturing centres are more apparent and more directly measured by NO_2 emissions, though these obviously overlap with major concentrations of population, with coal-burning areas especially amplified. Of

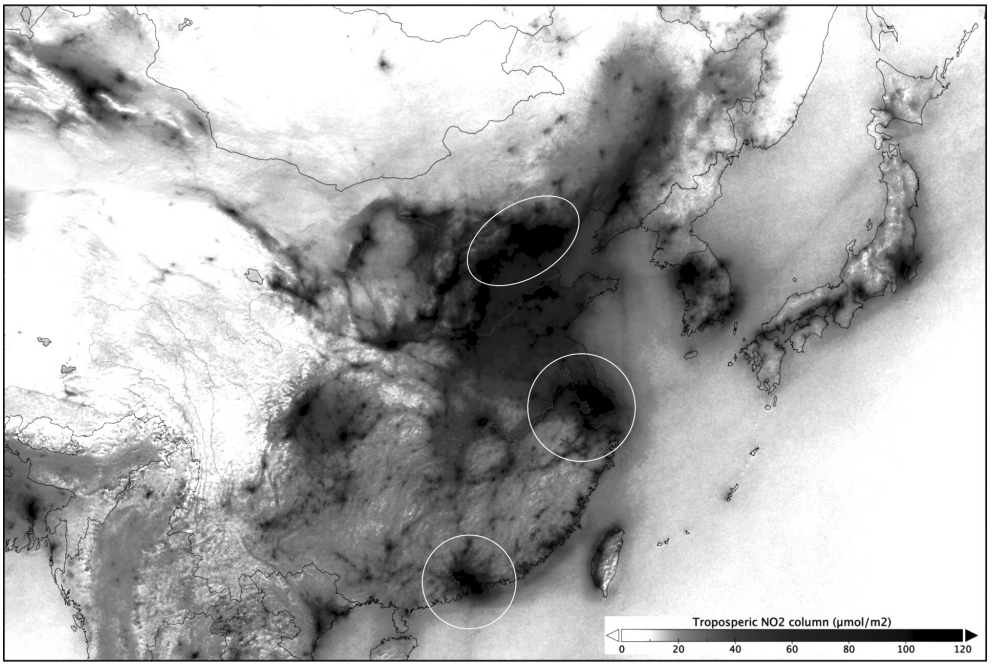
4 Tyukavina et al. 2018.

5 The 2010s saw the peak of the commodities bubble and the most rapid growth in slash-and-burn agricultural settlement in the DRC and surrounding area (as well as large agro-industrial deforestation in Gabon and elsewhere in West Africa). But the deflation of the commodities bubble by the end of the decade, paired with the global pandemic, would soon see NO_2 emissions in central Africa substantially diminished. A milder version of the same phenomenon is visible over the Amazon, driven by the massive deforestation that accompanied the extension of industrial agriculture in Brazil under the administration of Jair Bolsonaro.

these, however, the agglomerations in Europe and China are especially noticeable. In Europe, various peripheral hubs are evident (as in Poland, Czechia, and Italy's Po valley), but the major emissions derive from the traditional centre of industry and logistics stretching from Germany's Rhineland through Flanders to the port of Rotterdam and across to London – in other words, across the northern half of the 'blue banana' European megalopolis. But the real heart of global industry is quite clearly China, where coal power, crop burning, and industrial activity combine into a dark miasma. Looking more closely (as in Map 6) we can see the hyper-concentration of emissions in East Asia's major megacities. But a similar divergence between higher-tech and lower-tech industry is also evident: Tokyo's NO_2 emissions are much smaller than those of either the Yangtze River Delta or the Seoul Capital Area, despite Tokyo having roughly four times the GDP of Shanghai or Seoul. Within China, the Pearl River Delta megalopolis, Yangtze River Delta megalopolis, and the Jing-Jin-Ji megalopolis at the core of the Bohai Bay Economic Rim (circled in Map 6) all stand out. But smaller agglomerations are also visible further up the Yangtze to the west around Wuhan (and even smaller ones near Changsha and Nanchang to the south), as well as Chongqing and Chengdu.

The particularly strong emissions in the north derive in part from coal burning, visible in Shanxi (the country's top coal producer, supplying nearby power plants) and in the cluster around Shenyang in the northeast, where legacy coal plants provide power to the city's concentration of heavy industry. But the concentration along the Yellow River is also due in part to the largescale burning of crop residues across the wheat belt and the day-to-day traffic associated with the dense agricultural settlement of the North China Plain.[6] Meanwhile, the same region has also seen a rapidly growing (and traditionally coal-dependent) urban concentration stretching south from Beijing to Shijiazhuang and further still to Zhengzhou, at the heart of the central plain, with Xi'an visible to the west. Though Wuhan, Chongqing and Chengdu have proven important centres of inland manufacturing, the rapid urbanisation and extension of industry across Hebei and into northern Henan is likely the best single picture of the inland shift. Meanwhile, emerging industrial cores in northern Vietnam and parts of South Asia are also visible (the former in Maps 5 and 6, the latter only in Map 5), though in India rising manufacturing capacity in the Delhi megacity, for example, is hard to distinguish from the combination of several large coal-burning power plants and generally dense population settlement along the Ganges.

6 Zhao 2022.



Source: ESA

MAP 6 Annual average tropospheric NO_2 concentration, Asia, 2018

At first glance, then, the nightmare image of the economy as an omnipresent cloud of movement and malice has a certain degree of truth. It is, first, a literal cloud of emitted light and gas. Second, a more amorphous fog of economic abstractions, visible in both the conventional measurements of things like output, employment, and productivity and in the more conceptual categories of utility and invention. Finally, as the trails of NO_2 etched across the ocean signal, the cloud is also a literal and ever-growing swarm of commodities traversing the planet in their own strange migrations, mouths of metal and plastic gnawing away the surface of the Earth. Whatever lies beneath, within or between this grey horde of goods thereby seems an invisible animating force – not a beast with a body but instead a ghost stirring within a billion dead machines. A great ink cloud of supply and demand, current accounts, innovation. Commodities spilling from it like sleet, the cloud hovers above the seemingly stable body of the world, enshrouding the serpent whose scales hold no fixity. Beneath this storm of abstraction, the industrial commodities that seem to gestate more

commodities and the asphalt and steel that smooths their motion over the rough earth come together in a sort of integument – the organs forming the outermost layer of an organism – holding in and giving shape to more amorphous social forms, the fluids and sensitive organs of capital. These solid concentrations of industry are, after all, the source of all that light and gas visible from space. But this exoskeleton is itself being constantly cast off and reshaped, since even the most concrete of commodities are, by definition, ephemeral. What we feel at first as the solid flesh of the capitalist economy is nothing more than moulting skin: the factories, warehouses, and shopping malls, the serpentine highways arcing toward the steppe and linking the newly-risen cities in China's sunsoaked southern marshes to the long-fallen ones in the cold northeastern timberlands.

And where does this leave us? As the very molecules that compose this monster, how can we hope to gaze upon it? In a certain sense, we cannot. It remains a dark god, dancing in the dead space between transactions. At the same time, we also can't help but sense its presence, tugging at every corner of our lives. It has moulded its body into the very crust of the Earth, mutilated the myriad forms of flora and fauna, and even seized and reforged the flesh of the species to fit the pattern of its ritual. You cannot escape its tortures: the daily wounds of work and poverty, certainly, but also a world-historic deprivation so pervasive that it barely registers as an absence of agency at all. Imagine a black expanse. The air is echoless, screams swallowed like oil siphoned from a well. We are naked bodies writhing in the darkness, skin dimpled with blood-glittering grapnels snared to chains drawn by some machine churning ever-forward in the distance. This is the thing that we call the economy. As the gears grind, our backs are dragged over rough asphalt, flayed to raw muscle and quivering nerves. Each abrasion paints a landscape that we can never see in strokes of sharp pain that eventually wear down to a dull agony. This is the thing that we call work. Our faces can only look upward, eyelids fixed open by sharp pins like the red wings of rare moths splayed into specimens, pupils glistering with the light of distant high rises and behind them the stars burning in the cold dark. This is the thing that we call development. The world is better, we are told, than it has ever been before.

1 Technology as Ideology

We know capital first and foremost through the marks it leaves on our body. Bring these marks together like the pieces of a puzzle box and you maybe approximate the shape of the beast. So how might we map the marks of cap-

ital? Most of us feel nothing more than crushing weight. Pickers, sorters, and loaders feel it as the joint pain that attends endless motion. Retail workers as an ambient, psychological horror simmering beneath the tight folds of bright fabric and the machinic pulse of the top 40 playlist. Those in the kitchen feel it as a new flesh laid over the old in a hatchwork of cuts and bubbling grease burns. On the farms it is the hot sun pressed like a hammer on the neck, lungs heavy with chemical dust and slow-brewing fungal infections. But even those who try to feel out the full picture do so from within the limits of their occupation. Engineers are penitents of a mathematics made animate through occult magics of materials and mechanics. Economists, of course, speak of a global economy organised into neat national units, each composed of everyone's desires interlinked. Geographers emphasise the cities, regions and even human bodies that make up this so-called economy, each shaped by waves of 'deterritorialization' and 'reterritorialization' as certain spaces are built up through new investment and others fall into disrepair. Ecologists see the extension of the beast as a cascade of extinctions. Environmental scientists name it 'anthropogenic climate change.' Maybe the most concrete, though, are the geologists, who theorise our departure from the Holocene and into an entirely new geologic era, dubbed the 'Anthropocene.' And yet this era opens not, as the name would suggest, with the emergence of the human species, nor even with the advent of large-scale sedentary civilisations, but instead with the industrial adolescence of a specifically capitalist class society, which has now been etched into the geologic record through both the (geologically) rapid transformation of the global climate and the (generationally) gradual construction of a global 'technosphere' similar in size and scale to the biosphere itself.[7]

Peter K. Haff, the geologist who effectively coined the term 'technosphere,' rejects a simple anthropocentric framework that sees humanity as the driving force behind the new geologic era. He instead reverses the causal relationship, arguing that 'an emerging geological process … has entrained humans as

7 The concept of geologic 'spheres' was formulated in the late nineteenth century by the Austrian geologist Eduard Suess, whose work on the emergence of the Alps made substantial contributions to the classical paradigm of the field. Suess coined the terms 'biosphere,' 'hydrosphere' and 'lithosphere,' giving these systems a similar status as that of the 'atmosphere' (a term already in scientific use at the time). To constitute a geological sphere, Suess argued that a system must have a global extent, it must make use of pre-existing structural and metabolic resources, it must coexist with the other spheres (rather than displacing them), have a systematic autonomy and recycle its resources. For more detail comparing the concept of the technosphere to these requirements, see: Mendes 2021. For a concise critique of the 'Anthropocene' concept, see: Malm and Hornborg 2014.

essential components to support its dynamics …'[8] But, rather than the vaguely-defined humanity of the Anthropocene, in Haff's view, the subject that both results from and drives forward this process is what he names the technosphere, defined as:

> the set of large-scale networked technologies that underlie and make possible rapid extraction from the Earth of large quantities of free energy and subsequent power generation, long-distance, nearly instantaneous communication, rapid long-distance energy and mass transport, the existence and operation of modern governmental and other bureaucracies, high-intensity industrial and manufacturing operations including regional, continental and global distribution of food and other goods, and a myriad [*sic*] additional 'artificial' or 'non-natural' processes without which modern civilization and its present 7×10^9 human constituents could not exist.[9]

In other words: the vast array of *things* that compose capitalist society, without the people. Despite his attempts to emphasise that this is an emergent system and is therefore reliant on its constituent (chemical, biological, social, etc.) processes, Haff always maintains the narrative structure of his thought experiment, which positions this image of the technosphere as exterior to any human subjectivity: 'From the outside, that is, from its own vantage point, notwithstanding that its human parts are essential, technology appears to have bootstrapped itself into its present state.'[10] Ultimately, then, his list calls to mind the old trope of the ghost city where the coffee is still hot and the cars are idling even though all the residents have mysteriously vanished. But, instead of a single city, it's an entire planetary infrastructure that's been emptied of its '7×10^9 human constituents.' A haunted world, then, filled with not-quite-animate machines and gargantuan physical monuments to social institutions that, without us, quickly whither into little more than an inexplicable scar on the sediment.

On one level, this technocentric vision is clearly ideological, in the sense that it fails to critique the common sense shaping its own presumptions and, thereby, becomes prone to the same species of error as symmetrical claims that other mechanical (albeit complex) processes, such as those of genetics, also 'entrain humans' to their purposes – as in the 'selfish gene' theory of Richard

8 Haff 2013, p. 302.
9 Haff 2013, pp. 301–2.
10 Ibid.

Dawkins, which has long since been cast into the landfill of history.[11] Elsewhere, Haff is more explicit about the ideological underpinnings of the theory, contrasting it to the 'Marxist'[12] approach and arguing that 'the present discussion of technospheric dynamics is based on physical, rather than social, historical, or economic principles.'[13] His account even includes an entirely physical definition of the 'non-intentional purpose' (also referred to as a form of agency) that drives the technosphere's quasi-subjective dynamics and lays a framework of rules that influence human activity without determining it. In this sense, such an 'agency' is similar to that found in other geospheric systems, such as the climate dynamics of the atmosphere.[14]

An essential part of this agency is its teleological, or goal-seeking, quality, which also assigns ancillary purposes to a system's component parts. These purposes can be functional, insofar as they serve to maintain the continued coherence of that system (i.e., its 'acting-as-if-to-survive') or provisional, in the sense that the system must also provide for its component parts and, through this provision, constrain or incentivise them to act in its favour. Again: the principles discussed are purely physical properties of all dynamical systems, with biological metaphors such as the physiological role of the bird's wing (illustrating functional purpose) easily paired with purely mechanical metaphors of

11 The concept of the 'selfish gene' has been so thoroughly critiqued from almost every field within the biological sciences that no single source can adequately summarise the concept's shortcomings or its extensive mobilization across popular culture. If one were to choose a single, decisive source providing an overview of the problem, however, the best candidate would be: Fox-Keller 2002. Meanwhile, a broader critique of how scientific concepts are enveloped by ideological presumptions can be found in: Lewontin 1991.

12 The quotations are here meant to suggest some caution around Haff's use of the term, given that he cites the work of G.A. Cohen as a summary of the generally accepted Marxist position. To provide context to those unfamiliar with the current state of Marxist theory: this is a bit like citing Fritjof Capra's *The Tao of Physics* as a representative summary of the current state of quantum theory.

13 Haff 2016, p. 2.

14 Referring to non-intentional aspects of physical systems as a form of 'agency' was popularised through the work of French philosopher Bruno Latour, whose work was widely referenced within the humanities and reached the peak of its influence in the trend of the 'new materialisms' that briefly took hold across the sphere of pop-philosophy in the late 2000s and early 2010s. But the use of 'agency' in these works is highly questionable and not generally accepted by philosophers of mind, nor within philosophy of science. Andreas Malm offers a concise critique of the trend in *The Progress of this Storm* (New York: Verso, 2018). Malm, however, tends to argue from the standpoint of a naïve realism that suffers from opposite but largely symmetrical philosophical problems.

pistons in an engine (as an example of provisional purpose).[15] Different levels of complexity are simply defined by their order of emergence, with biological systems exhibiting emergent properties distinct from those seen in physical or chemical systems, for example. Based on this logic, Haff notes that technology represents 'something truly new in the world' and 'in this sense one might say that technology is the new biology.'[16] In other words, technological systems exhibit emergent properties that simultaneously supersede and rely on their biological underpinnings, which Haff implies are the next-lowest class of emergent systems.

On another level, though, Haff's hypothesis gestures in the right direction, insofar as it emphasises that emergent, supra-human forces follow their own dynamics, which exceed and diverge from the needs of the species from which these forces have emerged. This distinguishes Haff's perspective from the more pedestrian technicism of thinkers like Vaclav Smil – a favourite court philosopher of Bill Gates and former consultant for the World Bank and CIA – who renders clearly contingent social inequities as if they were natural laws and, for this very reason, is unable to escape the conceptual limits of a particularly mundane anthropocentrism. The basic thesis that Smil offers sounds, on the surface, similar to that of Haff:

> From a fundamental biophysical perspective, both prehistoric human evolution and the course of history can be seen as the quest for controlling greater stores and flows of more concentrated and more versatile forms of energy and converting them, in more affordable ways at lower costs and with higher efficiencies into heat, light, and motion.[17]

But, despite a substantial canon defined by its polymathic breadth, tying together work from anthropology, physics, economics, and engineering in vast pop-science epics that literally span human history, Smil's narratives are essentially collections of loosely organised facts and graphs fused to banal histories of great inventions created by great inventors that have so far succeeded in making the world a better place, but which now threaten dire consequences. While Smil is attentive to technical questions of concept and measurement when it comes to his facts and graphs, he rarely addresses the broader field of their social construction and, similarly, offers no real inquiry into why his list of inventors is populated mostly by white European men, nor of the curious fact

15 The details are described in Haff 2016, pp. 8–12.

16 Haff 2013, p. 302.

17 Smil 2017, p. 1.

that his Promethean narrative turns Malthusian at precisely the time that all these glorious technologies might make their way into the hands of those who populate the world's darker continents.

Nor is Smil able to make the crucial distinction that Haff does, identifying an emergent level at which these technologies operate above and beyond the sphere of biology. More often, he seems instead to travel down the chain of complexity, tracing complex constraints back to basic physics. After all, the main narrative device used in his account of human history is the reduction of social science to the second law of thermodynamics. But to critique him on this point is to shoot arrows at a strawman. Ultimately, Smil is clear that adopting the 'thermodynamic perspective'[18] is also essentially a thought experiment, admitting that 'energy flows limit but do not determine the biospheric organization on any scale'[19] and that 'no energetic perspective can explain why complex entities such as cultures and civilizations arise …'[20] And yet it is in this very admission that we see the real limit of the project, marked by an inability to admit to levels of complexity and agency that exceed the biological. The shortcoming is even more evident in his characterisation of human civilisations as 'the largest and most complex organisms in the biosphere,'[21] which he elsewhere categorises (alongside 'societies' in general) as literal 'superorganisms.'[22] Smil's extension of the concepts that characterise biological complexity to encompass the social sphere is itself a different and more nefarious form of reduction than his 'energetic perspective,' since it cages the emergent properties of social systems within the established limits of biology – effectively denying the possibility of a genuine science of society.[23] By comparison, we

18 Smil 2004, p. 549.

19 Smil 2017, p. 430.

20 Smil 2004, p. 549.

21 Smil 2017, p. 2.

22 Smil 2004, p. 549.

23 Maybe more tellingly, Smil's use of the term 'superorganism' to describe society also gestures at a particularly conservative faction of latter-twentieth-century biologists who sought to capture both the larger dynamics of animal societies (including human civilisation) and the drives of the biosphere itself in terms of lower-level biological imperatives. Among the best-known representatives are hippie idol turned vaguely right-wing, vaguely Malthusian environmentalist James Lovelock (best known for his now thoroughly discredited Gaia hypothesis) and renowned myrmecologist, popular environmentalist, and proud racist E.O. Wilson (made famous for his work on Sociobiology and revealed after this death to have been a prominent behind-the-scenes supporter of the most vile and pseudoscientific forms of 'race science'). Though a broad grouping, these thinkers are distinguished by both their attempt to reduce distinctly social dynamics back down into neater biological concepts, resulting in a peculiarly authoritarian form of environment-

might imagine a faction of fundamentalist chemists who argue that what we think of as biological organisms are 'the largest and most complex molecules' or even 'supermolecules,' entirely subject to and adequately described by the laws of chemistry alone.

Haff approaches the same basic topic from the opposite angle. Rather than reducing social dynamics down to their thermodynamic limits and then building upward from there, he seeks to describe the emergent agency of a more-than-human system, illustrating the lower-order limits and path-dependencies that emanate downward from this system's higher-order imperatives. In his account, 'humans have become entrained within a matrix of technology and are now borne along by a supervening dynamic from which they cannot simultaneously escape and survive.'[24] This is obviously similar to what we might identify as the core argument of communist theory, which is that – translated into Haff's own terms – humans are entrained within a matrix of social forms and are now borne along by a supervening class dynamic from which they seem unable to simultaneously escape and survive. There are a few key differences, of course. First and foremost, Haff intentionally conflates social institutions with technological systems and subordinates the former to the latter. His definition of the technosphere includes 'the existence and operation of modern governmental and other bureaucracies' as well as 'high-intensity industrial and manufacturing operations,' and, while he recognises that these 'more complex, dynamic parts of the civilisation – buildings, institutions and cities – often cannot maintain their existence if the larger system they helped define ceases to exist,' that 'larger system' is nonetheless a technological one. At times, the conflation of the social and technological is so extreme that it gestures toward a much more thorough reduction, where all human institutions might better be understood as social technologies. Much of this is merely an artifact of the perspective Haff enforces on the narrative, which proceeds from the viewpoint of technology itself. But, even if we assume instead that society exists as a distinct emergent system in its own regard, in Haff's hierarchy of emergence it would remain an essential-but-subordinate constituent of the technosphere,

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alism that emphasises the need for some new type of global sovereign power to emerge in order for climate change and ecological destruction to be adequately addressed. The basic position is therefore characterised by Geoff Mann and Joel Wainwright as 'Climate Leviathan,' in their book of the same name (New York: Verso, 2018). For an account of E.O. Wilson's long dalliance with eugenics and similar forms of racial pseudoscience, see: Borrello, Mark and Sepkoski, David 5 February 2002 'Ideology as Biology', *The New York Review*. https://www.nybooks.com/online/2022/02/05/ideology-as-biology/

24 Haff 2013, p. 302.

with social relationships shaped in the last instance by the supervening purpose of technology and not the other way around.

As in many scientific accounts, a seemingly objective and purely physical hypothesis quickly takes on unacknowledged political implications. At first, these seem harmless, as Haff argues that ideas like the Anthropocene and the technosphere, by offering a rigorous, scientific recognition of the scale of human activity, are essential to addressing the current planetary crisis. However, since the technosphere both supersedes and relies on the human species, it is literally inescapable. Its imperatives are treated as objective constraints on human activity. Haff is clear about the social implications:

> If working toward greater human well-being is not a question of satisfying human interests alone, but also of satisfying the interests of the technosphere, i.e., its survival requirements, then policies that respond to the needs of both parties may be easier to implement than those that focus only on human concerns.[25]

The political consequences become clear when considering what, exactly, the 'needs' of the technosphere are. The example Haff gives is energy use. Since part of the 'intrinsic purpose' of the technosphere is the need 'to find and consume high quality energy,' environmental policies that advocate any decrease in energy use or degradation of its 'quality' (understood in terms of physical efficiency) will be less successful than those 'based on promotion of energy use.'[26] And a keen eye will easily identify the unstated symmetry here between energy use and economic growth.

Ironically, then, Haff's account brings us back to even more conservative territory than Smil, who, despite his rabid anti-communism, is forced by his fidelity to the basic facts to endorse something very much like the degrowth position popularised in recent years by ecosocialists. In Smil's own words: 'growth must come to an end. Our economist friends don't seem to realise that.'[27] In contrast, Haff bakes an implicit political defence of capital accumulation and the status quo that sustains it into the very substance of his science, essentially arguing

25 Haff 2016, p. 21.

26 Ibid.

27 Vaclav Smil, quoted in Watts, Jonathan 21 September 2019 'Interview with Vaclav Smil: 'Growth must end. Our economist friends don't seem to realise that'', *The Guardian*. https://www.theguardian.com/books/2019/sep/21/vaclav-smil-interview-growth-must-end-economists; For a comparison of Smil's version of degrowth to that of the ecosocialists, see: Seymour 2021.

that those who advocate for degrowth – or really any form of radical transformation in the metabolic relationship of the human species and the non-human world – are taking up arms in a futile battle against a higher-order imperative of the technospheric system itself. His account thus follows a well-worn path that leads to the same destination as the genetic determinism so popular at the end of last century. The key difference is simply that, whereas those who conflated ideology with biology emphasised constituent, microscopic constraints on human activity, Haff's ideological portrayal of technology emphasises emergent, macroscopic constraints.

2 Mass

Ultimately, the image of a grey technosphere enshrouding the planet and entraining humanity to its purposes is an ideological artifact of the very social forms that Haff excludes from his narrative. It is something like the commodity fetish writ large: the relationships between people that form the fabric of any society appear instead as interactions between 'technologies' of various shapes and sizes, altogether forming a membrane of machines that obscures the social forces animating it. But it's important to remember here that such ideological appearances are also, in fact, 'real,' in the sense that they exert influence on human behaviour, thereby shaping social institutions and channelling the deployment of the species' productive power to such an extent that the very infrastructures of human habitation become, in part, the physical accretion of these abstractions. There is, of course, nothing strange about a class society deploying unimaginable amounts of labour to ensure that ideological mystifications might take material form. Place a brutal social hierarchy in the desert and the sands will soon be sculpted into pyramids. Such megaliths are materialised abstractions, animated only by the social relationships that brought them into being. Once the society that sustained them withers, the King of Kings is left to crumble in the wasteland. These colossal wrecks – the statues of gods and emperors, the avenues that hosted imperial promenades, the bazaars that bustled with commerce – are not simply fanciful images hewn into stone, nor practical artifacts of everyday life, but quite literally the fossils of extinct social forms.

Today's monstrous megaliths, though orders of magnitude larger, are no different. Understanding the social forms that currently entrain humanity to their purposes therefore entails an analysis of how unprecedented quantities of human labour, non-human trophic potential, and physical mass are mobilised to raise new globe-spanning technical networks, which we might think

of as planetary pyramids erected in the worship of capital. For political ecologist Jason W. Moore, this is why we can think of capitalist civilisation as less an economic system or even a social order and more a 'way of organizing nature.' Capitalism thereby produces a distinct 'world-ecology,' which is 'not the ecology of the world, but a patterned history of power, capital, and nature, dialectically joined.'[28] Thus, studying these effigies is not quite the same thing as studying the gods that they depict or the social practices that animate their icons. But, just as the commodity, at first sight a trivial thing, forms the starting point for the analysis of capital's abstract laws of motion, so too might the geospheric mass of all commodities – as the materialised form of appearance of capitalist society – offer a point of departure for mapping out the tectonic structure of the planetary productive complex set into motion by those laws. Even if the theory of the technosphere ultimately negates the emergent power of social abstraction in favour of the large-scale physical purpose that can be found in technical systems, its argument sets out from similar grounds. After all, Haff's starting point is quite literally concrete. The theory begins from the evident existence of a vast physical infrastructure that the human species has affixed to the earth and scattered across the atmosphere, enclosing sky and soil. Not only is this infrastructure real, but its scale is also immense.

Focusing, again, on what seems to be the most material evidence, scientists often attempt to approximate the impact of human settlement in terms of sheer mass. Biomass is the natural starting point, with the aggregate carbon mass of all the human bodies scattered across the planet scaled against the multitudes of flora and fauna. Domesticated species can then be added as ancillaries to the mass of humanity, approximating its extended impact on the structure of the biosphere. As Figure 6 illustrates, the immediate picture is mixed. While the total biomass of humans (~0.06 Gigatons of Carbon) and livestock (~0.1 Gt C) far exceeds that of wild birds and mammals (~0.009 Gt C), it is a small fraction of all animal biomass (~2.589 Gt C), most of which is concentrated in the vast horde of arthropods (~1.2 Gt C), fish (~0.7 Gt C), annelids and nematodes (~0.22 Gt C), molluscs (~0.2 Gt C), and cnidarians (~0.1 Gt C), each of which alone exceeds the combined biomass of humanity and all livestock. Even viruses (~0.2 Gt C) outweigh the total mass of humans and domesticated animals. Similarly, the total biomass of all crops (~10 Gt C) is only around two percent of total plant biomass (~450 Gt C). Meanwhile, the mass of all domesticated plants is a fraction of the mass of all bacteria (~70 Gt C) and is even outstripped by fungi (~12 Gt C) and the combined mass of archaea and prot-

28 Moore 2015, p. 8.

ists (~11 Gt C).[29] At first sight, then, the human species, a mere .01 percent of all of Earth's biomass, seems to shudder before the vibrant, inhuman edifice of a biosphere that swells beyond its control. Even our armies of cattle, hogs and broiler hens are little help, their armadas easily drowned in the ocean of worms that writhe beneath our feet. Human dominion is reduced to a mere province in the seething empire of ants.

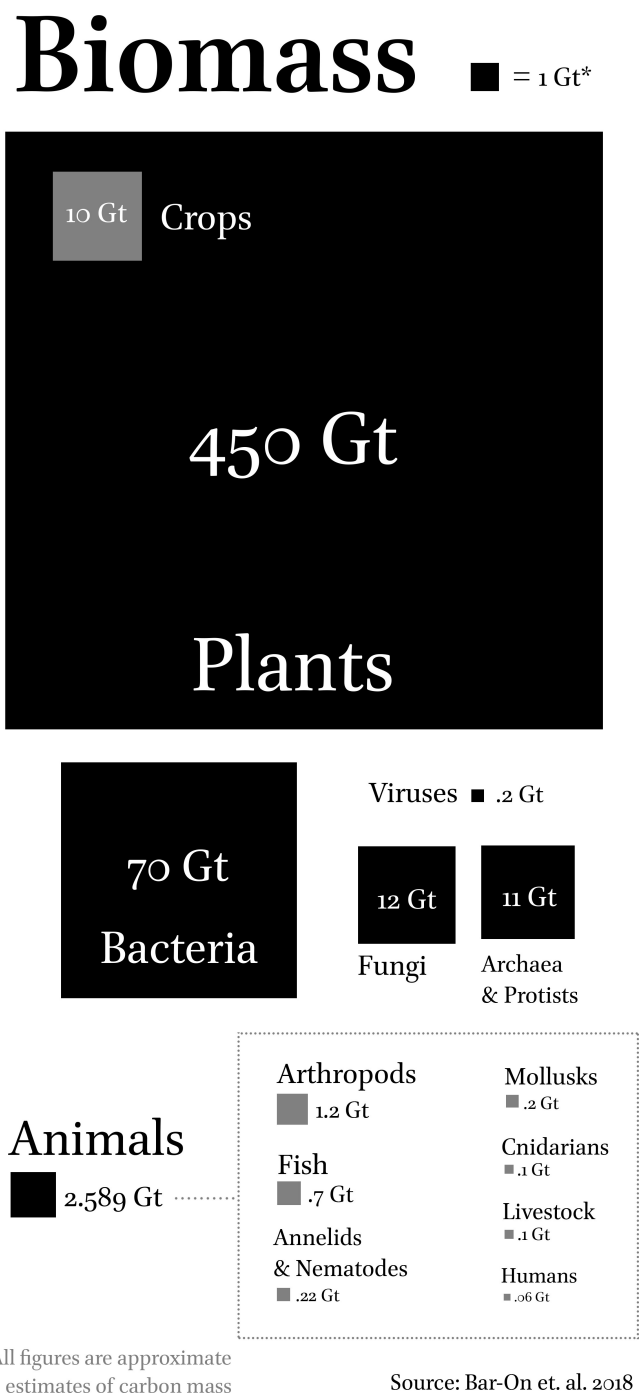
But this image begins to tilt when we turn to broader measurements of human impact. Even within the biosphere, the energy-intensive activities of that arrogant .01 percent of biomass exert a disproportionate influence within the web of life. For example, if we appraise human significance in terms of its ability to sculpt the largest single fraction of biomass – vegetation, 90 percent of the total – there is already evidence of an anthroformed biosphere. Today's class society continues the lineage of agrarian civilisation as traced to the first successful fusion of hierarchical social structures with agricultural production, from which point 'humanity has roughly halved the mass of plants' (from ~900 Gt C to the current ~450 Gt C). Just comparing the ratio of crop mass to total plant biomass misses this key dimension, since today 'the total mass of domesticated crops … is vastly outweighed by the loss of plant mass resulting from deforestation, forest management and other land-use changes.'[30] Again, destruction is the underbelly of development. The picture grows even more grim as we expand beyond the human impact on biomass to include total anthropogenic mass and mass waste, the bulk of which is not biological but mineral. This process of anthroformation involves the extraction of mass from the biosphere (as timber, fibres, etc.) and from the planetary crust (as sands, ores, etc.) as well as the material transformation of this mass via various manufacturing processes and its subsequent reinstallation across the planetary surface. It therefore composes a more or less continual cycle of extraction-processing-implantation, dictated by social imperatives.

Though at first it might seem that this mass is a mere inanimate sediment, similar to other geological strata – and, in fact, materials such as concrete, bricks, tile, and glass are often referred to as a new category of 'anthropic' rock – the reality is that even the most solid features of this stratum require continual renewal. Concrete, for example, deteriorates relatively rapidly under the pressure of moisture, algae, acid deposition, and vibration, with it estimated that nearly 100 Gt of the material poured during the first decade of the twenty-first century will have needed to be rehabilitated or replaced by 2030.[31]

29 Bar-On et al. 2018.

30 Elhacham et al. 2020, p. 442.

31 Smil 2013, p. 56.



*All figures are approximate estimates of carbon mass

Source: Bar-On et. al. 2018

FIGURE 6 Biomass

Left to wither on its own across deep time, then, much of the great grey mass would soon melt away into a flattening rubble of silicates hardly distinguishable from any other dune-swept desert. The real distinguishing factor of most anthropic rocks is not their origin or composition but instead their susceptibility to renewal by extrinsic forces, with increasing masses of such material continually recycled (as aggregate) to replace or rejuvenate weathered infrastructure. Thus, enmeshed in the flow of social metabolism, these vast anthropic sediments are not quite like their abiotic counterparts, instead sitting somewhere in between the long-run stasis of lithospheric features and the dynamic renewal seen in biospheric cycles. But this does not imply that anthropogenic mass has reached an equilibrium. On the one hand, the endogenous recyclability of much of this mass is minimal, with major materials subject to a relatively rapid down-cycling that soon makes them unusable.[32] This waste matter is then simply spit back out into the lithosphere, where it accretes much like the geologic layers of calcite left by eons of marine biomineralisation. On the other hand, the imperatives (specific to capitalist society) that have driven the process are attuned not to the ultimate formation of a stable metabolic cycle but instead to ceaseless accumulation. In aggregate, then, anthropogenic mass has grown at an almost exponential pace, requiring continually increasing inputs that can only be satisfied by extractive activity.

At its current rate of growth, what Haff calls the technosphere accumulates roughly 30 Gt of mass per year. Smil places this in perspective: in volume terms, 'we are emplacing worldwide anthropic rocks equivalent to [Mount] Fuji's volume roughly every two decades' which, in terms of mass, would be 'more like every three decades.'[33] But to properly conceptualise the scale here, it is better to place it in comparison with the biomass measures reviewed above.[34] Using the 30 Gt estimate, more than six times the total biomass of all animal life (~5 Gt dry weight mass) is extracted (mostly from the lithosphere, some from the biosphere) and incorporated into the built environment annually. Appraised at the individual level, this is equivalent to 'each person on the globe producing more than his or her body weight in anthropogenic mass every week.'[35] While other creatures displace soil and build their own structures, and some

32 Smil 2013, p. 112.

33 Smil 2013, p. 56.

34 To adequately compare anthropogenic mass measures to the 'carbon mass' measures cited in the biomass data above, we have to roughly double each of the biomass estimates to approximate an equivalent 'dry weight' mass that includes elements other than carbon, but still excludes water weight.

35 Elhacham et al. 2020, p. 443.

have even made a geologic impact, no other species comes close to the level of mass movement facilitated by humans within capitalist society. Considering only 'constructed' materials, termites come in a distant second, as they are estimated to emplace 5Gt of mass (mostly clay) in their mounds each year, though the figure may be much larger. These arthropod megacities are by no means insubstantial, as their mass movement is of the 'same order of magnitude as our civilisation's global extraction of metallic ores and other non-fuel minerals at the beginning of the twentieth century.'[36] However, it falls far short of our own ever-increasing average. Using a broader definition, a closer comparison is found among marine biomineralisers such as corals and phytoplankton, which are estimated to produce roughly 10 Gt of mass annually (~7 Gt of silicates and ~3 Gt of calcite).[37] Though the mineral contribution of these species has thereby been etched into the geologic record to a degree that far surpasses humanity's thin signature on the great scroll of sediment, they have nonetheless benefited from a substantial head start. Today, the major marine biomineralisers contribute only a third of the mass that capitalist production spits out in any given year.

The only equitable point of comparison is found at the level of the biosphere as a whole, dominated as it is by photosynthetic flora that incorporate an estimated 60 Gt of carbon from the atmosphere a year, though a substantial portion of this is also added back through burning and decomposition. Nonetheless, under the combined weight of deforestation, crop use, and the carbon emitted by capitalism's fossil economy, the emplacement of atmospheric carbon in flora has been steadily outpaced by anthropogenic emissions. Meanwhile, in terms of embedded mass, the comparison is stark. Combined with a few other updates that have helped narrow down earlier uncertainties around the microbial population, the most recent studies place total dry weight biomass at roughly ~1100 Gt (in 2020), with the proportions more or less identical to those listed above.[38] Altogether, the total anthropogenic mass that composes the technosphere is mostly made up of concrete (~549 Gt in 2020) and aggregates such as sand, clay and gravel (~386 Gt), which together account for more mass than all plant life on Earth (~900 Gt, dry weight). Bricks (92 Gt), metals (39 Gt) and asphalt (~65 Gt) make up most of the remainder, with a small fraction contributed by other materials such as wood, glass, and plastic. Of the metals, iron and steel are dominant. Their mass also illustrates the rapid rate of growth

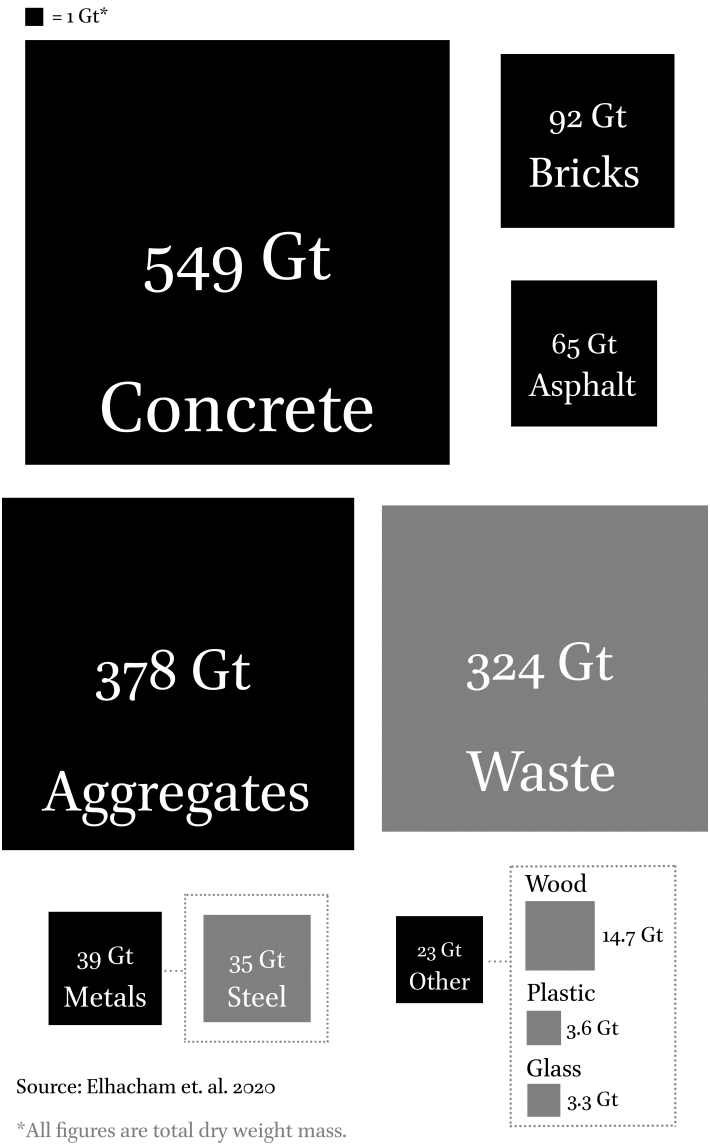
36 Smil 2014, p. 9.

37 Smil 2014, pp. 10–11.

38 Elhacham et al. 2020 use the total biomass figures, rather than the carbon mass measured in Bar-On et al. 2016, allowing for easier comparison.

Anthropic Mass

estimated total, 2020



Source: Elhacham et. al. 2020

*All figures are total dry weight mass.
Biomass figures can be doubled for a rough comparison between series.

FIGURE 7 Anthropic mass

in the extraction and processing of such materials: roughly 1 Gt of iron ore was being extracted annually by the year 2000 and, by 2020, this figure had tripled to roughly 3 Gt.[39] Similarly, steel output was more than doubled from 850 Mt to 1.88 Gt in the same time frame, with the slightly slower rate of growth due to the recycling of scrap steel in electric arc furnaces (about two-thirds of steel is produced from iron ore, with the remainder from scrap).[40]

Meanwhile, even the mass of relatively minor materials such as wood and plastic is still enormous when compared to animal biomass. For example, the total mass of plastics alone (~8 Gt) is just under twice the size of all dry animal biomass (~5 Gt) and nearly equivalent to all animal biomass if water weight is included.[41] Only when we get to more specific industrial inputs do the figures drop from Gigatons to Millitons: in 2010, for example, the total harvest of cotton lint was roughly 23.3 Mt, and in 2020 the total harvest of silicon was just over 8 Mt, with roughly half of that ferrosilicon used in steel production and the other half used in the production of aluminum, various chemicals, semiconductors, and solar cells.[42]

All are enormous numbers. But, appraised at the planetary scale, what is most relevant here is the aggregate mass of this distinctly capitalist technosphere relative to the other major geospheric systems. The most salient fact is therefore the following: total anthropogenic mass (minus mass waste) was estimated to have exceeded the total dry biomass of the planet sometime around 2020 – albeit with a margin of error in the range of six or so years, meaning that the tipping point likely lies somewhere between 2014 and 2026. If mass waste is added to anthropogenic mass, this turning point likely came almost a decade earlier, sometime between 2008 and 2018. There are, of course, other ways to estimate this. If we use wet biomass estimates, which include the mass of water within organisms (essentially measuring a portion of the hydrosphere), then the turning point (including waste) is somewhere between 2022 and 2040.[43] Humans and livestock are so small in comparison that it makes little difference which side of the equation they are included on. But if crops are subtracted from biomass and instead added to anthropogenic mass, the likely turning point (in dry mass) was within a span of years centred on 2014. If

39 The earlier figure is from Smil 2014, p. 57. The latter figure is based on estimates by the British Geological Survey and the USGS Mineral Commodity Summaries.

40 Worldsteel 2021 '2021: World Steel in Figures', *Worldsteel Association*. https://worldsteel.org/wp-content/uploads/2021-World-Steel-in-Figures.pdf

41 Elhachem et al. 2020, p. 443.

42 The cotton figure comes from Smil 2014, p. 46, the silicon figure comes from the 2021 USGS Mineral Commodity Summary.

43 Elhachem et al. 2020, Fig. 2.

anthropogenic carbon dioxide in the atmosphere is included, the turning point was around 1996 – but this hardly seems fair, unless we include the various atmospheric gases derived from the biosphere on the opposite side of the equation. Finally, if we expand the definition even further to include modifications to the lithosphere made by earthworks, dredging, and the indirect impacts of mineral and metal production, this turning point came even earlier, sometime around 1975.[44]

3 Malthus of the Machine

Such measurements seem to confirm Haff's hypothesis that, if the planet's biomass constitutes a layer of the geosphere that can be appraised at the geologic scale, then so too does the sum of human technical installations.[45] But why, exactly, has this technosphere only emerged recently in human history? Confined to a purely mechanical explanation, Haff would likely gesture in the same direction as Robert Gordon, an economist who argues along the same lines as Smil in pointing to a series of industrial revolutions between the mid-nineteenth and mid-twentieth centuries that produced unique clusters of 'Great Inventions,' such as electrification, which then formed the basis for a 'special century' of economic expansion (at least in the United States, Gordon's focus) defined by a 'singular interval of rapid growth that will not be repeated.'[46] While hyperbolic media would have us believe that the digital revolution and (always forthcoming) breakthroughs in AI, biotech, renewables or other sec-

44 Elhachem et al., Extended Data Fig. 1.

45 It should be noted, however, that the same disproportion visible in human vs. non-human biomass is also echoed at the level of anthropgenic vs. non-anthropogenic mass in general, the bulk of which is abiotic. While the technosphere is comparable to the biosphere in terms of its size and scale, the biosphere is by far the thinnest of all the geospheric layers. Its impact on the geologic record is due not to its relative mass but instead to its persistent influence over time – for example, the long-run deposition of calcite and silicates through marine biomineralisation, the impact of life on the rate of continental denudation, the Great Oxygenation Event, etc. When scaled against the lithosphere, both the total anthropogenic mass and the entirety of the biosphere are extremely small. Even the uppermost layer of the lithosphere, the crust, has only barely been scratched by the mass movement associated with technospheric imperatives. For example, the total ~1154 Gt of anthropogenic mass that existed in 2020 is itself a miniscule fraction of the ~22.2 billion Gt of mass estimated to compose the continental crust, as measured by: Peterson, B.T., and Depaolo, D.J., 'Mass and Composition of the Continental Crust Estimated Using the CRUST 2.0 Model', *American Geophysical Union*, Fall 2007.

46 Gordon 2016, p. 2.

tors will continue the trend, Gordon instead echoes his doctoral advisor, Robert Solow – co-creator of the prevailing exogenous growth model used across the field of economics – in emphasising the fact that even computerisation ultimately produced a very minimal effect on economic growth.

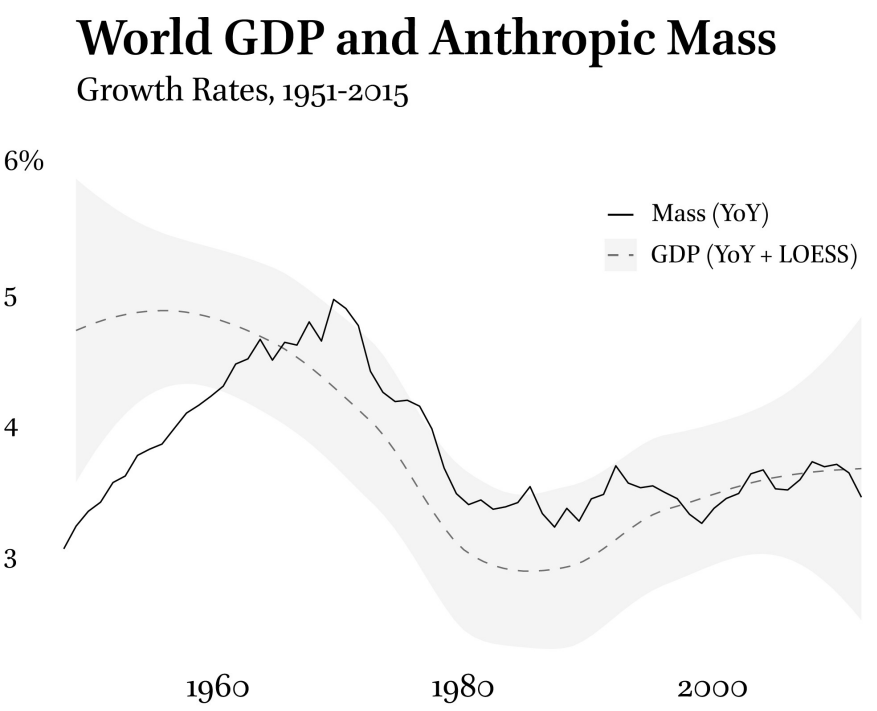
Though Gordon only offers evidence for the US economy, he also argues that subsequent growth bursts in places like China are largely attributable to the later rollout of those same core technologies. It is hardly coincidental, then, that China dominates in both the production and processing of key materials like steel. For scale: 1 Gt of crude steel was produced in the country in 2020, constituting 56.7 percent of the global total, compared to a mere 100 Mt in India, which ranked second. Similarly, 995 Mt of finished steel products were produced in China in the same year, 56.2 percent of the global total.[47] The same could be said of any number of key materials, especially those related to construction. And, as growth in India begins to outpace that in China, these shares will slowly invert. In other words, the rapid growth of the global technosphere should loosely follow the patterns of economic growth identified by Gordon, since most anthropogenic mass has been poured into the physical infrastructures composed of or made possible by – and, in Haff's account, made to accommodate – these very technologies.

As is to be expected, a comparison of the annual growth rate of World GDP and that of abiotic anthropic mass seems to confirm this rough symmetry (See Figure 8).[48] According to the most systematic measure available, anthropogenic mass did, in fact, grow most rapidly in the twentieth century, precisely when Gordon's keystone inventions were being rolled out and when the growth rates of output, productivity, and employment were high across the world's leading economies.[49] At the beginning of the century, anthropic mass consti-

47 Worldsteel 2021, pp. 9,15.

48 Since GDP is a flow, while anthropic mass is a stock, the growth rate of the former will tend to be more volatile (i.e. 'spikier') than the latter. Though the raw Year-on-Year (YoY) growth rate for GDP clearly oscillates around the growth rate for anthropogenic mass, its volatility makes the chart difficult to read. For this reason, Figure 8 uses the LOESS method to smooth the raw YoY growth rate data for GDP, demonstrating the underlying trend in the series more clearly. In a LOESS plot, it is conventional to show the 95 percent confidence interval in grey around the regression line. The anthropic mass data remain raw YoY growth rates.

49 In what follows, I will use the terms 'anthropic,' 'anthropogenic,' and 'abiotic anthropogenic' mass more or less interchangeably, despite their slight differences. Technically 'anthropic' mass would be the largest category, capturing all mass that is generally related to humanity, including human, crop, and livestock biomass. 'Anthropogenic' places emphasis on mass *created by* humans, and is the term used in Elhachem et al. 2020, which excludes biomass. Where necessary, I add 'abiotic' to contrast this mass with



Sources: Elhacham et al. 2020, Maddison Project Database 2020

FIGURE 8 World GDP and anthropic mass, growth rates, 1951–2015

tuted a mere 3 percent of global biomass. By the beginning of the next, it had effectively surpassed it. Even though this rapid growth seems to take the shape of an upward (though not quite exponential) curve, the annual growth rate of anthropic mass rose from a low early twentieth century average (of 1–2 percent) to peak in the early 1970s (at just over 5 percent), before declining to a moderate plateau (3–3.5 percent), where it has stayed from roughly 1980 to the present.

In other words, the pattern seems to loosely mimic the trends seen in Gordon's econometric data, which show a rapid burst in the growth rate in the middle of the twentieth century that declines after the 1970s. Using his broadest measure of output per hour, Gordon shows that productivity growth averaged

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anthropic biomass (humans + crops + livestock + certain microorganisms). Ultimately, though, even the broadest measures of anthropic biomass are negligible compared to abiotic anthropic mass, making these distinctions minor and allowing us to treat all these terms as near-synonyms.

1.8 percent per year between 1890 and 1920, but then nearly doubled to 2.82 percent per year on average from 1920 through to 1970, before dropping back down to 1.62 percent thereafter (his series ends in 2014).[50] Output per person follows a similar pattern (1.84 percent, 2.41 percent, and 1.77 percent, respectively). These changes also have clear consequences for human labour: the hours worked per person increase slightly in the 1890–1920 period by .05 percent per year, decline by .41 percent per year in 1920–70, and then see a sustained increase of .15 percent per year from 1970–2014.[51] Thus, the periods of the fastest overall output and productivity growth (and specifically growth in 'total factor productivity,' three times as high in 1920–70 as in the other two periods) also seem to be the fastest periods of growth in anthropic mass, part of which is embedded in machinery and other labour-saving infrastructure.

This should not be surprising. Gordon simply begins to make the necessary connection that Haff's intentionally technocentric narrative disavows (but which Haff himself would doubtlessly acknowledge): what the environmental scientists call 'anthropogenic mass,' and what the geologist calls the 'technosphere,' is also the material of the thing that is conventionally called 'the economy.' Here the spiral comes full circle. In fact, this is tautology. When we dig into the details of how anthropogenic mass is measured, we suddenly loop back to the exact same economic datasets: all the figures cited above derive their data through an approach called 'economy-wide material flow accounting' which uses observed correlations between economic activity and mass movement in a limited subset of times and places to create proxy variables that can 'measure the size and structure of the socioeconomic metabolism' and interpolate those measurements to times and places not directly observed.[52]

It should be no coincidence, then, that the growth rate of the technosphere seems to mirror not only world GDP growth, but the entire range of constructed growth rate measures – applied to output, productivity, investment and profit – mobilised in economic debates about mechanisation, stagnation, rising inequality, and recurrent crisis.[53] As is noted in this literature, even the economic boom across East Asia has not reversed the general slowdown in growth. But a slowing rate can obviously be accompanied by a growing mass, producing apparent paradoxes such as the fact that the rate of return on investment

50 Gordon 2016, Figure 1–1, p. 14.

51 Gordon 2016, Figure 1.

52 Krausmann et al. 2018. The figures above (especially the measures of abiotic mass) derive from the data and methodology established in the following three papers: Krausmann et al. 2009; Fischer-Kowalski, et al. 2011; Krausmann et al. 2017.

53 See, in particular: Brenner 2006; Benanav 2020; Smith 2020.

can be low even when total profits are high, or that the economy is in a state of 'secular stagnation,' despite absolute output (i.e. the dollar price of global GDP) etching out an upward curve.[54] Rates are, in most cases, the correct way to grasp changes in the dynamism of any system, which is why Gordon mobilizes them to measure the relative vitality of the economy over time – and why 'profitability' is always measured as a rate and not as the mass of total profits. But masses better indicate aggregate weight or accrued impact up to a certain point in time. The same relationship between rate and mass applies to the technosphere and this means that, today, even the largest of infrastructural projects – such as the construction of mega-dams and affiliated national power grids in Ethiopia and Tanzania – represent only a small percentage increase in the total anthropogenic mass of the planet even though they are similar in absolute size to mid-century infrastructural projects in places like the United States, when such megastructures were rare.

And, as Haff argues, these are not simply lumps of concrete. While it might at first seem that the most objective measures are those that reduce the phenomenon to its sheer mass, Haff stresses that the growth of this mass has its own purposiveness and that this is evident not only in its sheer geomorphic force but also in the fact that this mass is gathered into technical systems that can mobilise large quantities of free energy over long distances. Gordon then illustrates the connection between these technical or energetic systems and the growth patterns of the economy. Among his most crucial conclusions is the fact that, as growth slows, various 'headwinds' press against further increases in productivity. The most important of these is rising social inequality. As he notes, the post-1970s slowdown essentially stalled material progress for most of the US population over the past fifty years such that, '[b]y several measures, including median real wages and real taxable income in the bottom 90 percent of the income distribution, there has been no progress at all.'[55] Similar headwinds are visible in the sphere of education (declining quality of K-12 schooling, rising student debt), demographics (low total fertility rates leading to a shrinking labour force), and government debt (which calls into question the ability to fund remaining social programs, much less expand them). Alto-

54 In fact, this pattern seems to dominate a wide range of otherwise unrelated growth processes: measured by mass, it appears as an S-shape, where an early, lower plateau is followed by a period of rapid increase, which then plateaus at a new and higher steady state; measured by rate, it appears as a somewhat lopsided bell-curve, with low early rates followed by a bubble of high growth, which then gradually deflates. The consistency of this pattern is demonstrated in: Smil 2019.

55 Gordon 2016, p. 605.

gether, these trends imply that 'the future growth of real median disposable income per person will be barely positive …' in the foreseeable future.[56] And, since these headwinds are in large part a result of slowing economic growth, which is itself the result of technical limits to innovation, his argument ultimately implies that there may simply be material limits to the continued betterment of human wellbeing. The old theory of Malthus is here revived by the modern political economist, with agricultural constraints replaced by technical ones. Ultimately, we seem to see a causal chain that moves in the direction predicted by Haff, with the world's massive technical infrastructure shackling humanity to its own imperatives and, per Gordon, constraining the potential for future human flourishing. We might even suspect that our idea of 'the economy' is simply a displaced way of understanding this complex, machinic purpose.

But causes are fickle and mysterious creatures. The same chain of causation flowing from the inhuman mass of technical systems into economic directives and, from there, into impacts on human life can just as easily be read in the opposite direction: human activity creates social forces that appear to us as economic dictates, which then channel productive power toward the invention and proliferation of technologies that, in aggregate, appear as an enormous, inhuman swarm encircling the planet. The great grey horde of anthropic mass looms at the edge of our vision, humming with eldritch electricity. We are dependent on it, encircled by it, and subject to its imperatives. In other words, when we attempt to pull the curtain off the economy, we unveil its literal machinery. We see an industrial society and its consequences, a disaster for the human race. But then when we attempt to venture deeper into the labyrinth of machinery, to measure its mass and explore its patterns of growth, we somehow find that this very technology is a second veil. Peel back the metal and those same econometric measures return, whirring beneath the carapace. Haff is not really wrong in any of the details of his account. Each commodity being traded back and forth is, after all, a technical artifact. He's just looking at the evidence like a geologist, reading the story in the strata. Were civilisation to collapse, our species swallowed by the sands of extinction, the only evidence of human existence would be this arcane abundance of artifacts. It would be easy enough for an alien archaeologist to misconstrue a world of machines from the rubble, allotting the handful of skeletons found scattered through the silicates only a minor role in the great civilisation of cement.

56 Gordon 2016, p. 607.

4 Technics

While social systems are accounted for in Haff's theory, they either remain in a subordinate position or are misconstrued as machinic forms of management. When summarising the basic composition of the technosphere, for example, 'bureaucratic systems' are listed alongside those of 'communication,' 'transportation' and 'high-intensity industrial and manufacturing operations,' all of which are interlinked 'to metabolise fossil fuels and other energy resources.' Even 'modern governmental and other bureaucracies' are thereby reduced to their physical imperatives, as mechanisms that 'make possible rapid extraction from the Earth of large quantities of free energy.'[57] In this sense, Haff both adopts and degrades the more expansive concept of 'technics,' which has a long history spanning various usages in philosophy of technology, media studies, urban studies, and geography. Derived from the Greek *tekhne*, which encompasses not only the modern idea of technology but also art, skill, dexterity and similar concepts, technics emphasises that technology exists only through social practices. Moore describes technics as 'crystallizations of tools and ideas, power and culture.'[58] Moore's approach draws from the work of sociologist and urban theorist Lewis Mumford, whose 1934 book *Technics and Civilization* is often credited with popularising the term, and who, in Moore's understanding, used the concept to describe how 'power and production in capitalism embodied and reproduced a vast cultural-symbolic repertoire that was cause, condition, and consequence of modernity's specific *form* of technical advance.'[59] In the 1960s, Mumford even foresaw the emergence of something like Haff's technosphere, when he 'invented the term *megatechnics* to highlight that human civilisation was moving toward the development of a "uniform, all-enveloping structure."'[60]

For Mumford, this 'all-enveloping structure' is composed of 'megamachines.' In contrast to Haff, however, Mumford stresses that megamachines are not primarily technical systems but instead a particular kind of social relationship where individuals are made to operate as components within large hierarchical organisations, which form the basis of civilisation. His examples are the state bureaucracies that have historically enabled rulers to mobilise large workforces in the undertaking of complex construction projects such as canal-digging or the building of pyramids. This understanding of technics prioritises

57 Haff 2013, p. 301.
58 Moore 2015, p. 59.
59 Moore 2015, p. 176.
60 Arboleda 2020, p. 56.

the social aspects of technology and, on this basis, periodises sociotechnical development into different eras: a slowly dawning 'eotechnic' period, defined by the drawing-together of advances in technology and statecraft made over preceding millennia into a syncretic civilisational and technological complex; a 'paleotechnic' period marked by the emergence of 'carboniferous capitalism' via the industrial revolution in England, defined by rapid increases in energy use, the growth of urban and industrial infrastructure, the affiliated mass excavation of fuels, ores and monocultured crops, and an equally rapid decrease in the bioviability of human settlements; and finally a 'neotechnic' period, which Mumford thought to be in its earliest stage of gestation in the twentieth century, defined by advanced science and the emergence of a cooperative social intelligence driven by good will, but also threatened by the chaos and decay of the late paleotechnic era.[61]

The Depression-era development of immense hydroelectric dams in places like the scablands of the Columbia Basin in the US state of Washington seemed to point in this direction, converting a natural amenity such as the Columbia River into an 'organic machine' that could then enable the expansion of the immense electrical infrastructure and irrigation systems that turned the arid region into the breadbasket of the Northwest. For Mumford, examples such as this seemed to gesture toward the way that neotechnic systems could serve as the basis for both rural livelihoods and the political integration of town and country. At root, the equation was relatively simple and optimistic: 'The

61 Mumford 1934. Mumford's view of technics (including most of the names and basic character of his suggested civilisational stages) was drawn directly from the work of Patrick Geddes, a Scottish scientist, sociologist, and urban theorist working in the late nineteenth and early twentieth centuries, whose theories were rooted in the Positivism of August Comte. Though now decried as synonymous with reductionist forms of quantification and the totalising deployment of state power, Positivism proper was both a philosophy of science and a syncretic, humanist religion of sorts, which sought to bring together the entire range of scientific, artistic and spiritual insight in a novel worship of reason and human potential, thereby ushering in the advent of a new era in human history. It was, essentially, an iteration of utopian socialism, with Comte himself deeply influenced by the work of Saint-Simon. Geddes was a Positivist in this sense of the word, attempting to understand the formation of urban geographies in a holistic manner such that social ills could be alleviated through progressive reforms implemented by the existing state and with the blessing of those in power. He thus advocated for radical forms of urban planning rooted in both qualitative civic surveys of the population and quantitative methods drawn from all realms of scientific and practical knowledge. On the one hand, his work would become an important example of early ecological thinking, similarly adopted by Mumford. On the other, Geddes, like many a utopian before and after, would prove to be a useful idiot of the imperial state, sent to India and then Palestine to help the colonial government manage its urban planning and slum eradication campaigns.

steam engine tended toward an economy of monopoly and concentration; electricity would promote independence and decentralization.'[62] This was all contrasted to the degeneration of the paleotechnic era, visible in rising class conflict, social anomie, the brutalities of modern warfare, and the persistence of large-scale famine across much of the world – all salient themes for Mumford's key writings from the 1930s. Perhaps the most biting irony, however, was the fact that the 'organic machine' itself would soon be used to power and cool reactors at the Hanford site, where the plutonium used in the first atomic bomb was manufactured, providing the US with the military power needed to secure the expansion of its oil-based empire after WW II.[63] And, of course, the spectre of the paleotechnic has today taken on an even more literal form, as the fossil fuels that form its basis reach beyond their grave to wreak havoc on future generations, threatening to strangle any possible neotechnic epoch in the womb.

5 Alien Agency

Even Haff himself admits that 'the more complex, dynamic parts' of a collapsed civilisation cannot easily be read in its ruins.[64] The technosphere must be viewed in its uneven motion, unveiling an entirely different range of questions: Why did this planetary system experience its first rapid burst of growth where it did, when it did? Why does it accrete in thick layers in certain locations and in thin layers elsewhere? Why have certain sites been centres for agglomerating anthropic mass, while others have been areas of excavation? These questions cannot be adequately answered by an appeal to purely physical imperatives, as Haff suggests. In other words, while it is perfectly reasonable to concede that the law of increasing entropy, for example, does imply (at least on the cosmological scale) something like the emergence of life and, subsequently, technology, such an observation has absolutely no ability to explain why the technical complex that would come to encompass our own Earth began its present ascent among a pale people on a rainy island sitting offshore of a small peninsula in

62 White 1995, p. 56.

63 Observing these trends unfolding over the course of his own life, however, Mumford grew more and more critical of the technological reductivism visible across social theory and even in receptions of his own work, arguing that such an interpretation 'reads back into the whole story of man the narrow technological rationalism of our own age, and projects into the future a final state in which all the possibilities of human development would come to an end' (Mumford 1967, p. 4).

64 Haff 2013, p. 302.

Western Asia nor why it grew at the expense of social and ecological systems in Africa, the Americas, and the Asian continent's Eastern expanse – literally siphoning mass from these locations and feeding it into the new, hypertrophic urban cores administering the emerging industrial world. Such patterns can only be explained by reference to economic abstractions, which ultimately describe social relationships between people and the overall metabolism of the human species with the non-human world. Again, we return to that core lesson: these economic forms are not mere illusions, like a curtain covering reality, but are instead an integral part of that reality, exerting substantial influence over the world even as they also serve to obscure it, like a sandstorm reshaping the dunes.

Not coincidentally, Haff's theory of the technosphere was pre-empted by a similar argument made more than half a century earlier by Amadeo Bordiga, co-founder of the Italian Communist Party. In the form of an exposition on Marx's theory of ground rent published in the early 1950s, Bordiga argued that human settlement under capitalism takes on a cadastral form – a map cut up into land registry cadastres, assigning an owner to every inch of the Earth to whom ground rents for each plot accrue – which extends not simply to exchangeable rights over the surface of the planet but also inaugurates a new historic stage 'in the disposition of human installation on the earth's "crust," in other words in a layer which extends above and below the surface of the soil.'[65] This layer is planetary, and its dynamic nodes are the agglomerations of human habitation and industrial activity visible in urban centres.[66] But, for Bordiga, this is not exactly a 'technosphere,' because technology is only ancillary to its formation, a second-order effect. The character of this sphere is instead historically malleable, changing alongside revolutions in human social organisation. It is, in other words, better described as a sort of 'sociosphere,' – an emergent geospheric system defined by the aggregate social metabolism of the human species with the non-human world. The distinctly capitalist sociosphere differs from previous periods of human settlement first and foremost in 'the progressive reduction of the agricultural population and the fertility of the soil,' and 'the extension of the town to the detriment of the countryside.'[67] Capitalism is therefore accompanied by a unique form of what geographers Neil Brenner and Christian Schmid call 'planetary urbanization.'[68] This involves the mass reloca-

65 Bordiga 1952.

66 For reference, the current mass involved in urban construction is estimated to compose some 36.9 percent of the technosphere. (Mendes 2021, p. 9).

67 Ibid.

68 Although the term itself is relatively recent, it is inspired by the work of communist geo-

tion of excavated material, the systematic draining of nitrogen from the soil cycle, and the formation, in Bordiga's terms, of 'massive unitary infrastructures which allow the provisioning of a city' and transport its waste to be disposed of in landfills and industrial reprocessing sites that are cities unto themselves.[69] In other words, it entails the construction of what Moore calls a 'world-ecology' operating at the planetary scale and attuned to distinctly capitalist imperatives.[70]

But the particular planetary ecology that we find encrusted across the surface of the Earth is not at all the only possible one. In fact, Bordiga even describes it as the worst of all possible options for laying out population and productive installations, arguing that it is 'completely irrational' and that 'the territorial and geographical distribution of the instruments and equipment of production and transport, and therefore the distribution of people themselves' has 'in no other historical period, perhaps … presented such disastrous and appalling characteristics.' In other words, there is nothing natural or inevitable about this material exoskeleton, since it didn't emerge to serve technological imperatives but distinctly capitalist ones. Nor are the two so clearly separated. More accurately, we might say that technical 'agency' in Haff's sense emanates from the deeper imperatives of the specifically capitalist system of social domination. This is precisely why, according to Bordiga, the communist project entails 'physically introducing a totally different type of technical equipment for the soil and the subsoil.'[71] In other words, it would mean a complete reinvention of this planetary productive system in accord with both social need and ecological integrity. Ultimately, while the argument is similar to that made by Haff, it also performs a crucial inversion. The supervening force entraining human life to its purpose is not, actually, technical – at least not directly so. Instead, the planetary system only *appears to us* in the immediate form of 'technical equipment,' 'instruments,' and 'installations.' While these technologies and their imperatives are, in a way, alien, this is because even the simplest tools and artifacts are always already social. They are the most concrete symbols

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grapher Henri Lefebvre. Lefebvre, known for his work on the urban revolution and the production of space, began to draw attention to the planetary scale of these dynamics in his late writing, often in ways that cast a shadow over the more hopeful conclusions of his earlier theories. One of these late essays, published in *Le Monde diplomatique* in 1989, 'Dissolving city, planetary metamorphosis,' has since served as the touchstone for a recent revival of the idea of 'planetary urbanization' by the urban geographers Neil Brenner and Christian Schmid, among others. See: Brenner and Schmid 2013.

69 Bordiga 1952.

70 Moore 2015, pp. 14–5.

71 Ibid.

demonstrating that our individual lives are inextricable from the productive capacity of the species, which is itself structured through a metabolism with the non-human world.

However, a sense of this supervening social metabolism alone does not necessarily produce 'alienation' in the meaning used by Marx, nor the seemingly omnipresent form of alien agency that seems to be embodied in the cold motion of the technosphere. Instead, it is the interwoven forms of social domination unique to capitalist production that generate the image of capital itself as an 'automatic subject' capable of perpetuating itself indefinitely through a process of 'self-valorisation,' which then appears as if it were embodied in the technical carapace woven over the world through this valorisation process.[72] In other words, both social domination in general and the specific roles played by individual capitalists seem to disappear, transmuted into a god-like, singular 'capital' that imposes its imperatives on the world – a sort of ghost in the machine of the technosphere. Here, we can return yet again to the gothic theme that runs through Marx's own work, which consistently portrays capital in monstrous terms – alien, undead, hellish – a horror that is nearly indescribable not because it is too complex to grasp or too occluded by ideology, but precisely because it is so overbearingly sensible that we feel it everywhere, as the expanding hellworld in which we are encased. Again, Marx himself described capital as an 'alien mediator' that operates as an 'entity outside man and above man' and thereby becomes a sort of 'real God.'[73]

So we might portray the dynamic that Bordiga identifies in similar terms: the objective outcome of commodity society seems to be directed toward something like the xenoforming of the planet under clouds of carbon and nitrogen dioxides, sculpting an environment more suitable to the survival and flourishing of this alien demiurge.[74] Following this theme to its conclusion, we might then return to Bordiga's most accomplished student, Camatte himself, to argue that this 'technological exoskeleton' which is now larger, in absolute mass, than the entirety of the biosphere, is in fact a new nature constructed to cradle capital in its infinite expansion, enthralling humanity into a ritual dance, dreamless and domesticated. But even though the magisterial terror of such an image is alluring, an overemphasis on the alien, autonomous, and domesticating force of capital easily inverts reality by making the 'automatic subject' of

72 Marx 1976, p. 255.

73 Marx 1844.

74 Martín Arboleda offers a similar summary of its basic ends: 'the production of a technological exoskeleton that extends to multiple resource frontiers [...] in order to support the expanded reproduction of capital on the basis of machinofacturing.' (2020, p. 26)

capital into the sole driving force of history. It is no coincidence that critics often accuse those who invoke this image (especially Moishe Postone, in his *Time, Labour and Social Domination*) of offering a theory of capital evacuated of class struggle.[75]

In fact, this is the very same error made by Camatte, for whom the domestication of humanity had become so pervasive that the proletariat had been reduced to merely an aspect of capital's despotism and overturning the system from within seemed essentially impossible. Invariably, the only political path that remains visible in such accounts is the retreat to a millenarian vitalism, Camatte escaping to the forest (alongside a million or so hippies across North America) in the obsessive search for some organic outside from which to oppose the expanding sphere of death. Of course, in the end, this very attempt at escape is itself a manifestation of that death. The mirage of the separatist settler utopia draws forth the vanguard of capital to carve the frontier into cadastres. The spiral curves in on itself as history repeats, each frontier replaced by another, the baseline conditions for accumulation reinforced again and again by subsequent waves of settlement, each reshaping the landscape to better fit the evolving layout of production. Similarly, the apocalyptic vision of an autonomised capital as a sort of demiurge recrafting the world to its needs entirely independent of human intent – the very figure that haunts these pages – is maybe best characterised as something like capital's own self-image. It is a myth saying that any resistance against such an alien force is futile, that the only way forward is surrender or escape.

How, then, might we pass beyond this image of capital as a dark god animating the gears of the machine? Like Bordiga, we can take a certain orthodoxy as our guiding sigil. After all, Marx himself – the Virgil in our katabasis – reminds us that there is no escape. There is no way out of hellworld except through its lowest depths, where we discover that the pillars of fixed capital holding up the alien technosphere are really the 'dead labour' of living people. This is the basic structure of critique used by Marx in *Capital*, where economic forms that initially seem to have a life of their own are gradually revealed to be animated only through our own social activity. Meanwhile, it is no coincidence that the mirage of capital as an automatic subject seems to have gained appeal at a particular point in history: roughly the period in which capitalist production became truly planetary, encasing the globe in its technical exo-

75 A more even-handed critique of Postone, drawing in part from Postone's own earlier work, can be found here: The New Institute for Social Research, 'Postone and Class Theory', *ISR*, 2020. https://isr.press/Postone_and_Class_Theory/index.html

skeleton and operating at the same scale as other geospheric systems. On the one hand, this expresses a real limit, emphasising the ecological and political reality that there is no turning 'back' to artisanal production or escaping 'out' of the system, as in the settler mythos of utopian socialism and other forms of separatism (including the nationalist fantasies of building socialism in one country, or the anarchistic dream of constructing real utopias on the periphery or in the interstices of the capitalist world). On the other, nothing has really changed. The image of the demiurge is only produced through the rituals of worship that uphold it: work, wages, and wars of competition. The sociosphere may sculpt the earth, but social practice shapes the social forms that constitute it.

As Bordiga argues, the present distribution of sociotechnical installations across the crust of the Earth is not the only possible one. It is instead subject to struggle. In fact, class struggle is an inevitability, as individual capitalists and proletarians are incentivised to continually act out their collective roles as 'capital' and 'labour-power.' This struggle is itself a foundational feature of capitalist society and therefore spans the sociosphere it has produced, often acting in a decisive fashion to determine where, exactly, new technical infrastructures will be implanted and what their character will be. But class conflict also has a contradictory character, both constituting capitalist society and serving as the site from which that society can be challenged. Distinctly communist forms of social transformation must emerge from class struggle and class struggle is itself predisposed to produce them, but whether or not a partisan project emerges from any given confluence of struggles is ultimately a question of local political agency. After all, with no political force pushing beyond their bounds, even aggressive subsistence struggles on the part of labour ultimately reaffirm its position relative to capital. For example, demanding higher wages quite obviously leaves the basic social relationship of the wage fully intact, or even bolsters it. And there is now an abundant history of social-democratic experiments that, in attempting to negotiate a better deal for workers within the bounds of established social forms, ultimately end up serving as enforcers for the very system that they ostensibly oppose. Similarly, there is no shortage of revolutionary or near-revolutionary social conflicts that were effectively diverted away from a communist horizon and toward merely national goals or even explicitly liberal ones through the concerted political intervention of the ruling class and/or the absence of any organized communist force capable of opposing it.

But recognising this fact does not at all entail an abandonment of class struggle. Since the collective roles of capital and proletariat emerge from social practice, they can also be transformed in more fundamental ways when strug-

gles are forced to exceed the given boundaries set by these social roles – even if these excessive forms of political conflict emerge from and remain rooted in conventional proletarian struggles over the terms of subsistence.[76] In other words, communist politics must take as its practical foundation an immanent struggle *within and against* the hellworld of capital. It is a struggle over work, wages, and wars that also seeks to supersede each. As communist thinker Mario Tronti argued in the midst of a strike wave in postwar Italy: 'The working class *within* capitalism is the only *irresolvable* contradiction of capitalism – or, better, it becomes irresolvable the moment it *self-organises as a revolutionary class*.'[77] This is, again, a reaffirmation of a certain orthodoxy, traditionally expressed in the theory of the party. The partisan project is to build institutions that can serve both as vessels for the political excess that spills beyond the limited scope of individual subsistence struggles and as catalysts triggering tactical advances that push new subsistence struggles beyond their initial bounds.

There is no way out and there is no rapturous, final battle, no coming catastrophe that cannot be turned into fuel for the machine. There is just a bloody, slow grappling through ash and mud, inches lost, inches won. No collapse, only crisis and combat. The body of the beast must be broken open from the inside, corroded slowly as the cancer of communist measures cascades from cell to cell. Neither the social forms of commodity society nor the environment they have constructed simply dissolve. They must be intentionally dismantled and repurposed through careful experimentation. And, as the partisan project advances, it will have no choice but to wrestle with the material remnants of the social forms it is in the process of revolutionising. Even dead, the body will retain its mass, the heavy grey exoskeleton threatening to drown the world in rubble. Again: this vast aggregation of anthropic material is not quite inanimate. It is not a mere backdrop or a landscape. Like anything else, land and the built environment are social relationships that span the human and the nonhuman to constitute a planetary ecology operating at the scale of the species as a whole.[78] Since the material world requires continual renewal, this provides

76 This is the basic political divide between Bordiga's stubborn (but ultimately correct) orthodoxy and Camatte's bleak (and ultimately conservative) innovation, which led the latter to abandon the communist project entirely. This is also why the party retains its central role for Bordiga while, for Camatte, any attempt to construct institutions or organisations will ultimately see them function as mere 'rackets.'

77 Tronti 2019, p. 34.

78 See: Mike Gouldhawke 10 September 2020, 'Land as a social relationship', *Briar Patch Magazine*. https://briarpatchmagazine.com/articles/view/land-as-a-social-relationship

an opening for its reconfiguration and for the rehabilitation of the metabolism between human society and the non-human world. At the same time, existing agro-industrial infrastructures are also an integral part of the social-metabolic mesh keeping the species alive. If the sociosphere is transformed, the technosphere must follow. Only in this way can the sparagmos of the dying god seed a new future for the species, free of domination.

CHAPTER 3

Speak of Blood

The soft stink of sewage lurked just beyond the smell of fizzing beer and the fragrant smoke wafting from the barbecue stalls. It was another humid night in Southern China and the air, heavy with some coming storm, was draped over my neck with the same warm weight as a fresh-killed deer – you hoist the body on your shoulders to carry it from that cathedral in the wind-racked trees and the steam rises like a breath from the gralloched stomach, spirits whispering into the tender flesh at the base of the skull in the holy place where the most ancient part of the brain lies buried, reptile meeting mammal in shivering presentience. And the exploded city that had sprung up on the old wetland delta of the Pearl River was holy in its own way. Not so much a cloister as a confluence: the place where the great gyres dance in from the sea and the flow of industry converges, woven together into a single pulse of pure productive power. Rain plummets into the marshes and factory complexes in torrential bursts and then surges out again, coursing through canals into the braided rivers where barges float like flowers, beyond the squat factories humming in the darkness, beyond the glitter of the corporate headquarters in the city's financial core, then beyond even the port where the wind ricochets through the maze of containers until finally it spills further still to fill the unfillable abyss beneath the shipping routes shimmering like gossamer above the churning wine-darkness. From here, commodities pour out like a cleansing flood. Your mind may not know this place. But your body does. The clothes you wear, the tools you use, the pages of this book and even the ink that etches these very words likely passed through the Pearl River Delta. The very air that you breathe has been recomposed by its industry. In fact, you have come into contact with artifacts draped in the misty air of this marshland and shaped by the hands of its millions of workers more than you have touched any other human being.

That night, the pollution had been washed from the air by the passing typhoons. Rainwater still sparkled sharply on the asphalt, like broken glass. The plaza had just been completed. People walked carefully, as if uncertain of the ground. Nonetheless, the place was alive with light and laughter, fresh-lain stone still settling under passing footfalls. The paint on the side of the storefronts had not yet dulled and seemed instead forever frozen in that liminal moment between wet and dry. No one leaned on the glistening walls or brushed up against them. On the stillborn surface, the myriad colours of the storefronts were melted down to a single blue-black gradient by the ghost glow of the

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LEDs. The plaza itself was a similarly frenetic meld of cultures and purposes: a waitress with a thick Sichuanese accent wearing Hello Kitty tights under a dirndl served Chinese lagers on the patio of a vaguely-Bavarian biergarten; a spindly teenager from Xinjiang cooked cumin lamb kebabs on a portable grill he'd welded together from scrap metal; young men in matching polo shirts yelled the details of a discounted phone plan into microphones hooked to portable amplifiers at auctioneer pace, impossible to follow. At the time, many new developments took on a similar air of artifice and almost-incidental emulation, as if they were the product of some procedurally generated simulation of a city that had not yet reigned in its outliers and settled on a consistent cultural tone. Even the placement of the plaza was bizarre, like a glitch flickering in and out of existence, a small island of smooth tile, dry-wet paint and fizzing beer wedged between several of Shenzhen's largest industrial complexes in Longhua District, just beyond what was then the city's northernmost metro station.

Looming in the darkness outside the plaza were the pale blue walls of Longhua Science & Technology Park, colloquially known as Foxconn City. At the time, this was the largest factory complex in the world, employing somewhere between 200,000 and 400,000 workers within its three square kilometre business park. Many industrial facilities operated on enclosed factory town models, offering migrant workers housing in dormitories and food from company cafeterias. Often, the factories and other facilities would be separated from the rest of the city by walls and guard posts, but these borders were somewhat porous in practice. Foxconn, however, was a fortress. The walls were higher, security was stricter, and the Taiwanese firm was known for encouraging militaristic discipline among its workers. It was also quite literally a city-within-the-city, complete with its own hospital, and grocery stores, exercise facilities, and even a swimming pool. Meanwhile, Longhua District itself sat at the frontier of urban redevelopment and industrial upgrading. On the one hand, the neighbourhood was literally wedged between the rapid rise of suburban residential complexes geared toward the growing white-collar workforce and the persistence of the city's blue-collar sprawl of factory and dormitory (see Photo 7). On the other, it was also figuratively wedged between the old sweatshop Shenzhen – the squalid, labour-intensive industrial city that had spawned a gritty culture of alleyway inventors – and the new city of venture capital: a sterile, hi-tech hub for the sleek start-up culture of incubators and makerspaces. The feel of the plaza itself was therefore a strange middlebrow monstrosity, fusing the ambiance of the anodyne, white collar offices-above-shopping-centre developments seen along the metro's other suburban stops to that of the more proletarian plazas further north, accessible only by bus, taxi,

PHOTO 7 New condominiums and office tours in Longhua, photographed from the pedestrian overpass leading into the Foxconn campus nearly a decade after the events recounted here
AUTHOR 2024

and motorbike, where factory recruiters handed out flyers in front of noodle shops and migrant vendors still rolled out tarps on the sidewalk, selling USB cables and every other species of small electric trinket bought and pilfered from the miles and miles of assembly lines running like intestines through the belly of the megacity.

Such spaces slide naturally toward a certain surreal realism. At one point a group of shirtless, muscle-bound men marched through the plaza, waving red flags and chanting slogans in a carefully choreographed performance. This was not a militant workers' organisation, my friend explained, but instead a local weightlifting group recruiting new members. The sweat glittered sharply on their bodies like quartz in granite. For a moment, everything seemed equally inanimate. Human shapes became one with the material of the city: sweat glinted off skin like sparks from a forge, rain poured and pooled like molten metal, muscle melded with the stone underfoot. Eventually, the men disappeared into the darkness beyond the edge of the glowing storefronts and other bodies filled the space, softer and more broken. As the night deepened, the plaza seemed

to float free of its mooring, like a barge of lost souls set adrift on the river of cement. We were seated in red plastic (polypropelene) chairs at a flimsy plastic (polyethylene) table covered in a plastic (polyvinyl chloride) tablecloth in front of the cheapest restaurant in the plaza. I leaned back in my chair and the legs bowed like bones about to break. Around us people laughed and shouted in voices laden with a familiar desolation, the sound of joy hollowed as work eats time like a house lightened by the steady gnaw of termites. Anyone working 12-hour shifts six days a week knows the feeling. In the bar afterward, hunched over a drink dead-tired but beyond sleeping – arms coated with sweat, dirt, sawdust, oil, the glitter of pulverised metal, the pink mist of bone and muscle that settles like spores of mould on the pale apron of the meatpacker – everyone's voice is raised in a sort of frenzy, eyes like berserkers. Someone tells an awful joke and the volume of the feigned laughter rises to an absurd pitch, each voice striving toward a revelry just out of reach. Then the wave crests and the voices fall into the emptiness. You hunch back over your beer and let your eyes sink to the bottom of their open grave.

1 The Last Graveyard

We were waiting for shift change so we could meet up with a group of electronics workers affiliated with a local, semi-underground worker centre. Though we didn't know it at the time, we sat on the edge of a knife. The decade prior had seen a rapidly rising tide of industrial actions which only seemed to intensify in the wake of the Great Recession. In 2010, a strike wave tore through the Pearl River Delta and then spread throughout the country, centred on the auto industry. The most prominent of these was a strike at a Honda parts plant in Foshan, just west of Guangzhou, involving thousands of workers. The strike had garnered the attention of intellectuals, activists, and reporters, and was widely hailed as a turning point for the 'workers' movement' in China.[1] Responding to years of steady inflation, the workers at the Honda plant not only won pay increases but also inspired similar actions at 60 other factories across the country, most in the auto sector but also extending into other product lines. This was followed by nationwide increases in both the legal minimum wage and the *de facto* wage paid by most companies, which in those years lay well below the legal minimum.[2] Altogether, the strike wave involved tens of thousands of

1 See, for example: Silver, Beverly 2 July 2016 'The Remaking of the Global Working Class,' *Truthout*. https://truthout.org/articles/the-remaking-of-the-global-working-class/

2 Chuang 2019b.

workers.[3] It also spread well beyond the Pearl River Delta, with 2010 capped by a cluster of autoworkers' strikes involving some 70,000 workers at more than 70 different companies in the Northeastern city of Dalian, which has long been a central hub in China's auto industry.[4] Since it won both significant wage increases and saw a concurrent attempt to pass widespread labour legislation and democratise the All-China Federation of Trade Unions (ACFTU) – the sole legal union in China, administered as a mass organisation of the party but run in close collaboration with business owners and upper-level managers, who are usually responsible for the appointment of shop-level union leaders – outside observers hailed the strike wave as marking the turn from 'defensive' actions demanding things like wage arrears or an end to particular workplace abuses to 'offensive' actions that demanded things like wage increases, alongside more worker involvement in the existing labour relations system.[5]

In retrospect, however, the Honda strike marked the beginning of the end. The ACFTU reforms were local and limited experiments, signalling the rollout of more subtle methods for suppressing dissent.[6] The labour laws that were passed were rarely enforced.[7] Meanwhile, the trend of struggle soon reversed, with 'defensive' actions growing only more prominent as low-end factories began to relocate inland or overseas: 'between 2011 and 2018, two thirds of all manufacturing demands were related to wage arrears, while only nine percent involved calls for wage increases.'[8] The 2010 strike wave was followed by the 2014 strike at Yue Yuen's shoe factory in Dongguan and a series of strikes and demonstrations at the Lide Footwear factory in Guangzhou. Involving an estimated 40,000 workers, the Yue Yuen action was likely the largest strike in Chinese history, but it was nonetheless focused on purely defensive demands (unpaid wages, severance pay, and social insurance) raised in response to fears that the factory would relocate to cheaper sites in Southeast Asia, where the company

3 For an overview, see: Lüthje, Boy April 2011 'Trade Unions and Worker Struggles in Guangdong, Chen Weiguang Interviewed by Boy Lüthje.' *Global Labour Column*. http://column.global-labour-university.org/2011/01/trade-unions-and-worker-struggles-in.html

4 Slaughter, Jane 15 October 2014 'Review: Behind China's Wildcat Strike Wave', *Labour Notes*. https://labornotes.org/blogs/2014/10/review-behind-chinas-wildcat-strike-wave

5 As one academic account explained in the years after: 'Images of yellow-hatted trade union officials brawling with well-organised and disciplined young workers pursuing their legal rights against a Japanese multinational has increased pressure on the ACFTU to reform and induced damning criticism from senior ACFTU figures in Guangdong of its own local officials.' (Clarke and Pringle 2010, p. 65)

6 For a long-run overview of these changes within the ACFTU and China's labour relations system more generally, see: Hui 2019.

7 For the exact methods of 'passive repression' deployed by the ACFTU, see: Friedman 2014.

8 Chuang 2019b.

had already begun opening new facilities. Similarly, the Lide Footwear actions, aided by local labour NGOs, succeeded in winning 'over 120 million yuan in severance pay and unpaid wages and benefits' when the company announced plans to relocate to a downsized facility at the edge of the city. In the case of Yue Yuen, the following years saw renewed strikes at the Dongguan plant and several other facilities, now part of a larger wave of protests against factory relocations and closures, which accounted for 15.7 percent of all labour actions between 2015 and 2018.[9]

The year 2014 was also the high point of organising by labour NGOs and the optimistic activists who had emerged from these struggles. According to one former participant, writing under the pseudonym Wen, these activists (and their affiliated organisations) could be divided into three categories, classed both by their demographic and ideological character as well as the temporal order in which they emerged: first was an ideologically amorphous grassroots core of former migrant workers, few of whom were college educated, which had begun to take shape as early as the turn of the century; second was a 'civil society' grouping of liberal university graduates operating in close collaboration with activists in Hong Kong, which had become particularly influential in the years around the 2010 strike wave and – because of its links to global networks of labour scholars and NGOs – succeeded in shaping the optimistic discourse of an 'emerging labour movement' that became dominant in these years; and third was a younger 'radical left' faction that had emerged by the mid-2010s, centred on clusters of self-described 'Maoist' students at elite universities in Beijing (though many of these students were from poorer backgrounds), which had initially formed through Marxist study groups and later saw participants conduct worker inquiries and attempt to get factory jobs.[10] Throughout the entire period, activist organisations intervened in many major struggles and formulated 'extraordinary long-term campaigns involving strike actions, bargaining with employers, petitioning of the government and sometimes clashes with the police' in hopes of building a broader labour movement, only to find that local firms 'had very little to offer them due to the shrinking profit margins that had given rise to the disputes in the first place.'[11] At best, activists were able to help workers secure higher severance payments, but proved unable to win much beyond this. Ultimately, though, such organisations were only involved in a small portion of industrial struggles.

9 Ibid.
10 Wen 2023.
11 Chuang 2019b.

The mirage of a nascent 'workers' movement' was rooted, in part, in the tendency for foreign scholars and labour journalists to conflate the limited interventions of these activists with the countless multitude of strikes, riots, blockades, and petitioning protests organised by militant workers with no connection to these networks or even to one another.[12] Attempts to craft a sort of working-class ideology to match the movement that seemed to be emerging therefore initially seemed to be bolstered by trends on the ground. In retrospect, however, it is now clear that the 2014 Yue Yuen strike was the end of an era, rather than the beginning of one. Similarly, the subsequent decline in labour unrest was ultimately shaped more by the structural transformation of Chinese industry than either the tactics adopted by activists or even the repressive measures deployed by the state. Almost a decade later, Wen therefore looks back on the era as one of 'unjustified optimism,' in which 'activists, academics and even some reformist All-China Federation of Trade Union (ACFTU) leaders for years looked to Europe and the U.S. for China's own future path.'[13] But these were questionable reference points, dating back to an era when the labour-intensive nature of many industries ensured that manufacturing would play a larger relative role in the overall structure of employment. For reference, compare the 40,000 workers involved in the Yue Yuen strike to the Great Steel Strike of 1919 in the US, which saw roughly 300,000 workers participate. The difference is made even more stark when we consider that the population of China in 2014 was some 1.37 billion, while the total population of the US in 1919 was a mere 104.5 million, making the relative impact of the 1919 strike far, far larger than even the most widespread strike waves of the 21st century.

This is not to deny that a substantial growth in manufacturing jobs had accompanied industrialisation in China. After all, as a share of total employment, primary industry (agriculture, forestry, mining) had long been declining, while the share of those employed in the secondary (manufacturing and construction) and tertiary (services) sectors had risen throughout the 2000s. But tertiary employment surpassed primary in 2011 and secondary in 2014.[14] Overall, secondary employment had already peaked by 2012, with service jobs mak-

12 As another mainland labour activist involved in these struggles points out: 'It was the collective actions of Chinese workers (especially those in the coastal manufacturing sector) that attracted the activists and pushed them to advance together with the workers, rather than those activists with different backgrounds and worldviews driving the workers' actions. However, the activists … did play a definite role in the formation of the workers' own internal organizing networks, providing a foundation for [some of their later] actions.' (Quoted in preface to Wen 2023)

13 Wen 2023.

14 Within industry, this rise followed a substantial decline that accompanied the forced

ing up the loss. Afterwards, secondary employment declined slightly and then plateaued (Table 1). But this plateau was enabled mostly by continued growth in the construction sector, rather than in manufacturing. This detail is visible when looking specifically at employment for migrant workers, who have long been the most important labour force for the manufacturing sector. Among migrant workers, manufacturing employment peaked as early as 2008 (at 37.3 percent of all jobs) and combined industrial employment (i.e. manufacturing and construction) also peaked in 2012 (at 54.1 percent), such that services would grow to make up more than half of all migrant worker jobs by the final years of the decade (Figure 9).[15] A more pronounced version of the same pattern is visible in each sector's respective share of GDP, with the tertiary sector surpassing the secondary sector in 2012 (Table 1). While it is conceivable that a pivot to higher-tech product lines might see the secondary share of GDP recover in the latter 2020s, a similar recovery in employment is unlikely since these lines are also more capital-intensive. At the colloquial level, the shift to services has also been widely visible in the gradual emergence of yellow-clad food delivery drivers dashing down streets, sidewalks, and alleyways on their electric scooters as they rush to make strict, algorithmic deadlines for minimal pay.

In other words, the global wave of deindustrialisation had arrived at last. The unrest among Chinese industrial workers in the early 2010s therefore bore less resemblance to the strike waves that birthed the major American unions in the 1930s than it did the losing battles fought by those same unions in the 1970s and 1980s. In retrospect, then, these years proved not to be the inauguration of a new era for the workers' movement so much as the final quiver of a stillborn struggle. As growth slowed and profits narrowed, repression simply drove the point home. The latter half of the decade saw a series of expanding crackdowns on all forms of grassroots organising, with a particularly harsh focus on labour NGOs and Marxist students seeking to engage with industrial workers. It began with arrests and threats against feminist activists[16] in early 2015, followed by widespread repression against worker centres[17] and other labour organisers

bankruptcies and mass layoffs across the older state-owned industrial sector in the latter 1990s and first years of the 2000s. Prior to this decline, employment in industry had peaked at 23.5 percent in 1997, still substantially lower than its second peak in 2013–14.

15 Data from the National Bureau of Statistics' annual Migrant Worker Monitoring Survey Reports [农民工检测调查报告], most recent year available here: https://www.stats.gov.cn/sj/zxfb/202504/t20250430_1959523.html.

16 For an overview of these events, see: Parwana 14 May 2020 'Hooligan Sparrow: 15 Years of Feminist Struggle', *Chuang Blog*. https://chuangcn.org/2020/05/hooligan-sparrow/

17 Shannon Lee, Shannon 29 July 2017 'Making Sense of the 2015 Crackdown on Labour NGOs in China', *Shannon Lee's China Blog*. https://wolfsmoke.wordpress.com/2017/07/29/2015-labor-ngo-crackdown/

TABLE 1 Shares of Employment and Output, by Sector,* 2000–22

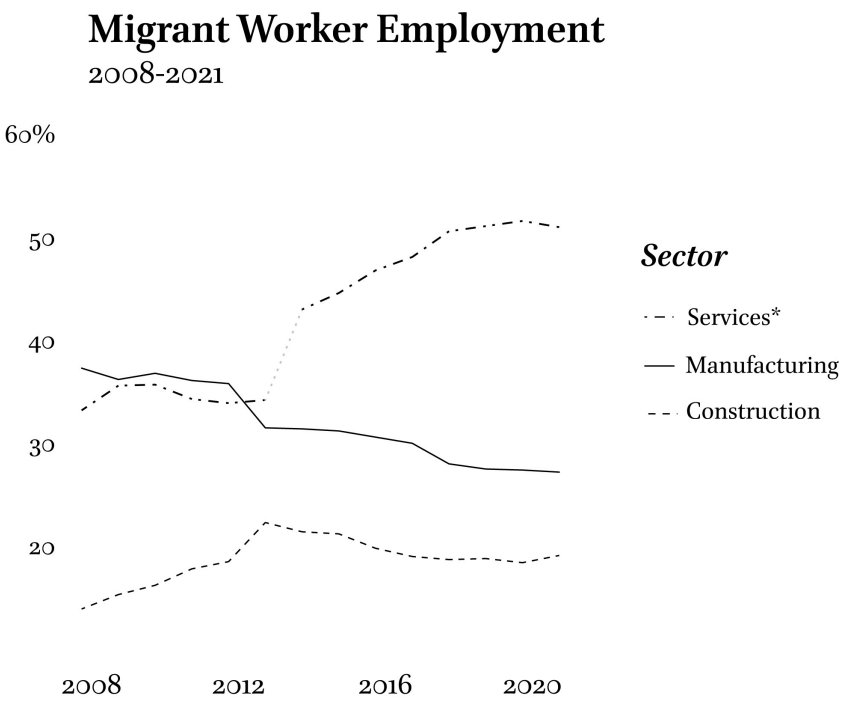
Year	Primary employment	Secondary employment	Tertiary employment	Primary output	Secondary output	Tertiary output
2000	50.0	22.5	27.5	14.7	45.5	39.8
2001	50.0	22.3	27.7	14.0	44.8	41.2
2002	50.0	21.4	28.6	13.3	44.5	42.2
2003	49.1	21.6	29.3	12.3	45.6	42.0
2004	46.9	22.5	30.6	12.9	45.9	41.2
2005	44.8	23.8	31.4	11.6	47.0	41.3
2006	42.6	25.2	32.2	10.6	47.6	41.8
2007	40.8	26.8	32.4	10.2	46.9	42.9
2008	39.6	27.2	33.2	10.2	47.0	42.9
2009	38.1	27.8	34.1	9.6	46.0	44.4
2010	36.7	28.7	34.6	9.3	46.5	44.2
2011	34.7	29.6	35.7	9.2	46.5	44.3
2012	33.5	30.5	36.1	9.1	45.4	45.5
2013	31.2	30.3	38.4	8.9	44.2	46.9
2014	29.3	30.2	40.5	8.6	43.1	48.3
2015	28.1	29.7	42.3	8.4	40.8	50.8
2016	27.4	29.2	43.3	8.1	39.6	52.4
2017	26.7	28.6	44.7	7.5	39.9	52.7
2018	25.8	28.2	46.1	7.0	39.7	53.3
2019	24.7	28.1	47.1	7.1	38.6	54.3
2020	23.6	28.7	47.7	7.7	37.8	54.5
2021	22.9	29.1	48.0	7.2	39.3	53.5
2022	24	28.8	47.1	7.3	39.9	52.8

* Note that 'Industry' includes both construction and manufacturing
NATIONAL BUREAU OF STATISTICS

later that same year.[18] As the decade went on, repression expanded to include additional labour NGOs, a number of young leftists,[19] and the entire network

18 Solidarity with Chinese Workers' Struggles, 28 December 2015 'The Guangdong Six and the rule of law (of value): Thesis on the December 3 crackdown', *Chuang Blog*. https://chuangcn.org/2015/12/theses-on-dec-3/

19 Chuang 14 June 2018 'Let the People Themselves Decide Whether We're Guilty', *Chuang Blog*. https://chuangcn.org/2018/06/eight-leftists-analysis/



*Methodology changes between 2013 and 2014, earlier years understate employment in services.

Source: 2012-2021 Annual Migrant Workers Monitoring Survey

FIGURE 9 Migrant worker employment, 2008–21

of Marxist student organisations that had emerged at Chinese universities.[20] Overall, Wen argues that 'the workers' struggle never consolidated itself organizationally or politically and therefore had little left to cling to when the tide of strikes seemed to phase out.' It should therefore 'come as no surprise that such activism was not able to survive state repression at a time when it was also losing its own material foundation.'[21] More generally, the tendency to conflate labour activism with independent militancy among workers also tended to obscure the fact that repression had both preceded the emergence of the activist networks and extended well beyond them, with workers deemed to have led militant strikes long subject to harsh punishments even in cases where their demands had been won.

20 Yuan Yang 13 February 2019 'Inside China's crackdown on young Marxists', *Financial Times*. https://www.ft.com/content/fd087484-2f23-11e9-8744-e7016697f225

21 Wen 2023.

From the plaza, we watched the gradual pour of people across the pedestrian overpass leading toward the factory complex. Bodies emerged from the darkness beyond or faded into it. Eventually the flow increased, signalling a change of shift somewhere in the depths of the glowing dark. The posture of the incoming pedestrians also underwent a subtle transformation, their shoulders now heavy, hands anxious, eyes lost at some nowhere-point in the distance. Time is a wound written in the body. Shortly after the strike wave in 2010, Foxconn City made international news for a spate of worker suicides. Probably the most famous image from these news stories was a picture of the nets installed by the company outside its dormitories to prevent people from jumping to their deaths. While the company tried to stress that the sheer size of the facility made such tragedies unavoidable – often citing the fact that the share of suicides among employees was the same as that in the population as a whole – this simply broadened the implication. As Wen notes, the strikes and the suicides were essentially inseparable. In the years that followed the original deaths, workers would even adopt the threat of suicide as a form of protest. In 2012, more than a hundred gathered on the roof of one of the dorms, threatening to jump unless management met their demands. The same protest was repeated in 2016 and 2017, with smaller groups of workers demanding back wages.[22] Meanwhile, the suicides slowed but didn't stop.[23] By then the activist networks had been dismantled and the tide of industrial struggles had ebbed. Writing at the 'end of an era,' Wen's conclusion is simple: 'We have to face the fact that the immediate future is bleak.'[24]

In 2014, the same year as the Yue Yuen strike, a worker named Xu Lizhi joined the ranks of the dead, leaving behind a sparse but powerful collection of poems that spread online in the wake of his suicide. In one, the 24-year-old Xu referred to the factory as 'the last graveyard of our youth' and described his fellow workers in similarly ghostly terms: 'Industry captures their tears before they have the chance to fall / Time flows by, their heads lost in fog.'[25] What stands out the most about Xu's work is the fact that these were the very years in which China was hailed for its particularly rapid development, including its substantial reductions of extreme poverty and the gradual elimination of

22 Merchant, Brian 18 June 2017 'Life and death in Apple's forbidden city', *The Guardian*. https://www.theguardian.com/technology/2017/jun/18/foxconn-life-death-forbidden-city-longhua-suicide-apple-iphone-brian-merchant-one-device-extract

23 Nao 5 February 2015 'Four years later, still a graveyard of Chinese youth', *Libcom*. https://libcom.org/article/four-years-later-still-graveyard-chinese-youth

24 Wen 2023.

25 Xu Lizhi 2014.

the worst-offending sweatshops and heavily polluting industries. Nor was Xu alone. His poetry was part of a broader genre of migrant worker literature and culture that had thrived underground for years before being elevated into the mainstream over the course of the 2010s, where it was represented in formal venues by award-winning poets like Zheng Xiaoqiong.[26] And this elevation was accompanied by a certain memorial air, with migrant poetry placed alongside the photos and illustrations visible at migrant worker museums – two of the most prominent are in the Pearl River Delta, both of which are sponsored and subsidised by the state – which tend to emphasise the great sacrifice made by migrant workers in building a modern China.[27] But there is no air of progress or noble sacrifice in Xu's work. His poems are instead infused with the sense that there is something irrevocable about such suffering. In his departing poem, he bemoaned being unable 'to call back the soul that I've lost.'[28] If this is a sacrifice at all, we might imagine it less as an act of heroism and more an act of expulsion, like an offering of food for wandering ghosts left to rot in some shrine in an alleyway.[29]

As the bodies split and flowed around us, the workers emerging into the plaza from the darkness of the factories beyond did not seem to carry any noble historic mission. They instead bore the same weight of loss as Xu, shoulders worn down by the clock-time of precise and measured movements. It is in moments such as these that you truly realise the extent to which the economy is quite literally embodied – and not just in the abstract or aggregate sense, but literally in your body and in mine and in their slow breaking as labour-power is extracted into the endless roar of machine systems in carefully allotted units of

26 For an overview of the phenomenon, see: van Crevel, Maghiel 26 April 2022 'How China's Labour Migrants Write Poetry in the Workshop of the World', *Jacobin*. https://jacobin.com/2022/04/chinese-internal-labor-migrants-factories-battler-poetry-dagong; and, for an oral history from a few writers involved in the movement, see: Ma Junyan, 06 April 2022 'The Sound of Chinese Migrant Worker Writers', *Sixth Tone*. https://www.sixthtone.com/news/1010031

27 For an overview of the exhibits at the three museums, see: van Crevel 2019.

28 Xu 2014.

29 And this is a narrative excluded from the official memorial rites. Only the grassroots migrant worker museum in Picun, Beijing (run by migrant workers themselves) had an exhibit on the Foxconn suicides. The exhibit was one of several, including a memorial to migrant worker Sun Zhigang, beaten to death by police in 2003 for not carrying his temporary residence permit, and records of the mass evictions of migrant workers that had taken place in the surrounding area in the late 2010s (van Crevel 2019). But, in 2023, the museum itself was evicted and its building demolished. (ALR Editors 19 May 2023 'Farewell, Picun! On the Closing of China's Museum of Working Culture and Art', *Asian Labour Review*. https://labourreview.org/farewell-picun/)

time, all of which returns to us crystallised in the shape of money. In a way it is this breaking that connects us, a class of increasingly atomised individuals nonetheless united at a distance in the myriad sameness of work and its horrors. Maybe this is why Xu's poetry resonates so deeply despite all cultural divides: that sense of irrevocable suffering he so deftly narrates is the native tongue of the proletariat. Regardless of where we were born or what we do for a living, our bodies are all slowly and steadily ripped apart and our minds flayed by the tarsal claws of machine systems and mathematical models arranged into a haunted, mirrored hallway of endless, mindless iteration. I pulled out an orange 20-*yuan* bill to pay for our beers. Placed on the polyvinyl chloride tablecloth, it seemed to glow briefly, like an ember fresh-cast from some fire burning deep in the factories. We got up and moved further into the crowd, looking for the workers we were there to meet. But they were somewhere near the end of the line. The plaza still seemed to be simply floating there in the darkness, growing less and less stable. Soon, the crowd flooded over us and the light dimmed in the shadow of so many bodies, as if our barge were sinking at last into the dark flow of the concrete. We stood and walked through the mass of people, searching for faces in the fading light.

2 The Carnival

Later that same night we found ourselves in another bar some distance away, sitting at a long table with a dozen or so workers from Foxconn and other electronics factories across the city. The place was a large, loud, and obnoxious pastiche of US sports bar and UK pub clichés, with vague tatters of Americana pasted on the walls side by side with soccer jerseys and big screen TVs radiating Chinese variety shows. Since most of the main walls were floor-to-ceiling glass, the space was reflected back and then reflected again, cascading into a carnival version of itself. Every motion was multiplied. The glow of each TV rippled down a maze of thrashing mirrors. And, like the plaza, everything inside seemed cheaply surreal, like we had wandered onto the stage of the 'neighbourhood bar' scene in a low-budget Hallmark movie. The floors were wood-coloured vinyl, the legs of the tables chrome-painted plastic. Even the staff seemed out of place, as if these were not the employees at all but instead the set designers wrapping up their work. Several simply sat in the back looking at their phones, while others walked aimlessly in the darker stretches of the mostly empty expanse. Were these their regular clothes, or some sort of costume? That year, the *shanzhai* fashion lines were emulating the occult streetwear popular several seasons ago in the US, so the one bartender who seemed to actually be

working had on a black outfit studded with white pentagrams and Baphomet sigils.[30] Her sweater was emblazoned with English in Fraktur-font: 'Hail Satan. Live Fast, Live Forever.'

On stage, a 'worker culture' band loosely affiliated with the labour NGO scene played socially conscious rock music, which was alternately bland and pedantic. Like any leftist subculture in any country of the world, the entire aesthetic was little more than an exhaustion of socialist nostalgia. The tragedy of our great defeat is revived in the farcical garb of a self-serious subculture, rubbing salt into the never-healing wound. At the table, however, grand aesthetics were dissolved in granular discussions of work and life. The workers' descriptions of factory life echoed the body horror of Xu's poetry, illustrating a workplace governed on the one hand by unrelenting machines and on the other by the constant supervision of stopwatch managers. As one Foxconn worker explained in an interview in 2022, almost a decade after Xu's suicide:

> Before we enter the shop floor, we need to hand in our phones and any other electronic devices … During the shift, you have to stand the whole time and cannot stop for a break. If you do not work efficiently and slow the line, a foreman overseeing this line will urge you to work faster. They are very disrespectful to workers and use very abusive language. If you talk back, you'll be fired at once.
> … I work at least 12 hours every day, with only 1 hour of lunch break. Every day, all I did was mechanically press and close a packaging box … My brain was dulled over time. You do not know what time is on the shop floor and that made every minute more unbearable.[31]

Nor were such conditions unique to electronics assembly. Another worker's description of a facemask factory in Guangdong in 2012 was similar to that of the Foxconn worker in 2022:

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30 *Shanzhai* (山寨) goods are knockoffs of major brand-names and fashion fads, often with subtle reinventions. Frequently, companies that begin producing such knockoffs end up developing the designs in their own unique direction and some thereby become distinct domestic brands that diverge from the originals. The most famous case is likely that of Xiaomi, which began as essentially a producer of cheap Apple knockoffs but has since established itself as a leading electronics designer with its own distinct brand identity. The practice has thus been an important feature of industrial upgrading and domestic brand formation.

31 Our Reporters 14 December 2022 'Interview with a Foxconn worker from China', *World Socialist Web Site*. https://www.wsws.org/en/articles/2022/12/15/hjyo-d15.html

> Working in the factory has turned me into a robot. I live a mechanical existence … Each work post has a production quota, determined by specialised employees who stand behind our backs, timing us with a stopwatch. They always try to raise the quota by counting more than we actually produce. Moreover, they do this in the morning when we have the most energy, forcing us to repeat that speed for 11 hours. Otherwise we don't reach the quota and have to do unpaid overtime … Some people don't even go to the toilet – not because they don't need to go, but because they're afraid they won't meet the production quota if they do.[32]

In reports on working conditions across all sectors of manufacturing (but especially within the export industries) rigid time discipline and ruthless management by often-abusive supervisors are recurrent themes.[33]

A few of the workers at the table announced that they planned to quit early next year during the annual Spring Festival. The practice was common, with migrants cashing out their social insurance payments before heading home for the holiday, then staying a while longer in their home villages or travelling a bit before returning to the coastal production hubs to find work at a new factory much the same as the old one. The flow is also perfectly familiar to anyone forced to subsist in the ruthless service industry, where vacations can only be wrested from the pittance of savings spent in the space between storming out of one job and struggling into the next. Others at the table unveiled their grievances for comparison, examining the timing and magnitude of wage arrears, recounting the success or failure of friends who'd tried to obtain their social insurance payments before leaving the job, and competing to see whose assembly lines had the most abusive managers. While such topics seemed mundane, it is in these rudimentary realities of class society that communism

32 Wo Ai Xiangcai, 'One Day', in Chuang 2016.

33 Among those involved in labour organising in China, two major 'worker inquiry' projects have offered intricate documentation of both working conditions and attempts by workers to agitate for their interests and organise wildcat strikes. The first are the 'Factory Stories' (工厂龙门阵) volumes put together by an underground collective of Chinese communists, some of which are available in translation by *Gongchao* and *Chuang*. An English translation of strike narratives collected by the Factory Stories group has also been published in: Hao Ren, Eli Friedman, and Li Zhongjin (Eds.), *China on Strike: Narratives of Workers' Resistance*, Chicago: Haymarket, 2016. The second major reference point was a collection of diary-style essays produced by a worker going under the name of 'Wanzi' (丸子, meaning 'Meatball') based on their experiences working in seven different factories in the Pearl River Delta between 2010 and 2017. Altogether, Wanzi's 'Factory Diaries' amounted to 170 thousand characters and became a major reference point for those involved in workplace organizing in China in the 2010s. This text remains mostly untranslated.

can always be glimpsed like a muscle moving under the skin. Despite ceaseless repression and grave historical defeat, the invariant communist program is relentlessly reborn in struggles for subsistence and against domination – not because these struggles lead to limited victories (they usually fail) or broader social reforms that gradually ratchet up toward socialism (often, the result is instead national chauvinism) but instead because they tend to overspill their own bounds by initiating mass political actions that take on an irreducibly conflictual character.

Ultimately, as Tronti notes, 'there is no quality intrinsic to organised production that makes it always and only of service to capitalist power: everything always depends, in the end, on the relation of forces established in the struggle.'[34] Meanwhile, the banality of work and wages (or the droll details of their absence) can provide evidence of evolutions in the murky megastructures of capitalist production: changes in its planetary geography, the technical systems that undergird it, ever-enhancing methods of social domination, or the twin gestation of new workforces primed for development and pools of surplus labour left to the abject misery of slum or prison. For this reason, Tronti advocated for rigorous forms of 'workers' inquiry,' through which communist partisans could learn the basic terrain on which they were operating and compose a coherent working-class power within it. Making contact with workers in the world's major industrial districts is an obvious first step in this process.

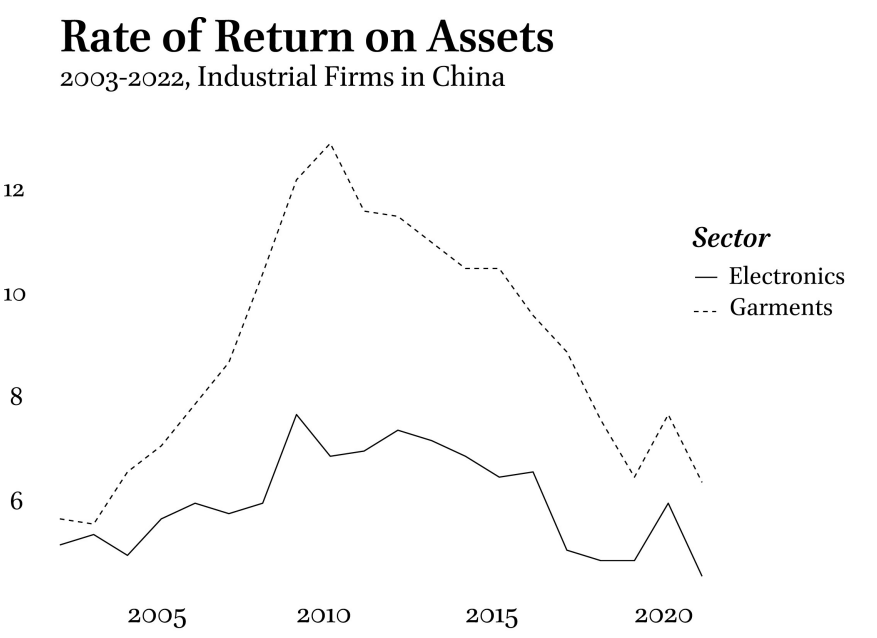
Behind the daily grievances, then, sat the age-old fears: the Foxconn workers exchanged rumours that another of the company's factories in Kunshan, Jiangsu, had slowly begun to downsize due to rising labour costs, accompanied by robotisation of the remaining production lines; some talked about the prospects of transferring inland to the new 'iPhone city' in Zhengzhou, Henan, where cost of living was lower, but others scoffed at the idea since they'd get paid less as well; workers from other electronics companies mentioned rumours that their factories would shut down in the next year, transferring production to newly-opened sites in Vietnam. Many of these stories would prove false or exaggerated in the coming years, though each had its kernel of truth. Indeed, the distance between rumour and reality was less important than the underlying theme, which was simply that the workers' lives were contingent on decisions made by their employers. More than this, decisions made by firms and investors had even become a geomorphic force, sculpting the lived environment in which the workers found themselves forced to scramble for work:

34 Tronti 2020, p. 73.

the sprawling factory complexes, the hatchwork of plantations and paddy fields on the periphery, the gargantuan infrastructural systems underlying the city, the green space allotted to reservoirs and forest parks, and of course the dormitories where the workers slept, the luxury condos in the downtown core, the financial towers glittering on the skyline, and even the bar that we were in at that very moment. Capital is not a metaphor. As an emergent property of many individual decisions, it is a substantial force that shapes the material environment much like the thrashing of rivers or the pelting of rain.

But capital also operates via determinate class institutions, the most important of which is the firm. And it is here that capital is most obviously depersonalised, because the decisions made by firms that then shape the lives of the workers are not made in a vacuum, nor are they simply choices made to feed the inordinate greed of corporate executives. They are instead made according to a competitive calculus of firm survival, as appraised in quarterly balance sheets and forecasted demand. When many firms driven by this calculus crash together in the great cacophony of competition, a higher-scale social logic emerges which then inveighs back on these individual components – much like temperature emerges only as a property of many molecules colliding with one another, but not as a property of any individual molecule in isolation. Even for capitalists, then, capitalist imperatives take on a depersonalised appearance. For these individuals, this emergent social logic is not perceived as some sort of mystical force but is instead a banal fact of business: any firm that fails to turn a sufficient profit over a sufficiently long period of time *relative to other firms* will ultimately be starved of investment.[35] Since China's coastal export hubs had initially been founded on small-scale, labour-intensive sectors like garment production and low-level assembly (where the wage bill composes a large share of overall expenses), the abundance of cheap and relatively skilled labour had once guaranteed higher-than-average profit rates. But this also exposed these sectors to particularly rapid declines in profitability when labour costs began to rise. By contrast, in larger, higher-tech and more capital-intensive sectors such as electronics, plant and equipment costs were higher (lowering relative returns), but profits also declined less rapidly (see Figure 10). Even more importantly, electronics also seemed to enjoy more long-term potential for industrial upgrading.

35 Cheap credit and government subsidies, both capable of creating a tenuous undeath for privileged companies, are no real exception, since they merely draw down pools of profit produced elsewhere and, as we will see, tend to aggravate overcapacity (and ensuing stagnation) in inverse proportion to their diminishing returns.



Source: National Bureau of Statistics

FIGURE 10 Rate of return on assets, 2000–20, industrial firms in China, electronics and garments

The steady inflation in labour costs within China is best understood as a confluence of three different trends: first, local inflation in real estate prices and in the cost of living in the coastal cities, which made relocation of more labour-intensive production lines inland more lucrative than retaining production in the old export hubs; second, general inflation of the *renminbi* itself – tied in part to changes in the larger structure of global trade and finance, as well as macroeconomic policy decisions such as the selloff of US Treasuries held by the Peoples Bank of China – which made Chinese production (in both coastal and interior provinces) relatively more expensive when appraised against rising competitors in South and Southeast Asia; and third, wage increases due to both the elevated baseline of consumption that accompanies urbanisation (or simply 'development' more generally) and long-term demographic trends that have increased competitive pressures in the labour market, with rising lifespans and low birth rates combined with the aging of the migrant worker population to produce a relative scarcity of labour as the share of working-age adults began to decrease against the share of retirees. Workers' struggles were an often-necessary form of mediation transmitting these inflationary pressures from the market into the wage bill of the firm. As Tronti reminds us:

'the trade union and its struggle cannot *alone* break out of the system; they are destined to be inevitably *part* of its development.'[36] The long decade of workers' struggles therefore both responded to and helped to sculpt the new geography of Chinese industry that arose in the wake of the Great Recession. But, although these rising costs have certainly created powerful incentives for the relocation of industries, particularly in labour-intensive sectors, industries also exhibit a certain inertia. Established firms have already dimpled the space-time of society, drawing labour and infrastructure into orbit around their own localised interests. The push of rising costs is therefore always confronted by powerful countervailing forces that tend to fix production in place whenever possible.

Economic geography has long emphasised the importance of these countervailing forces, evident in the 'agglomeration effects' of industrial clusters. Individual firms benefit from a whole range of amenities only available in established industrial agglomerations, including established relationships with suppliers, access to a skilled labour pool, collective spillovers in knowledge leading to higher efficiency, links to local business services, and access to high-quality industrial and commercial infrastructure, often linked to particular physical amenities that have been made into economic assets, such as access to riverine or oceanic shipping networks. Though infrastructural investment helps to stoke the formation of emerging clusters, many of these effects can only be reproduced in new locations slowly, if at all. On the one hand, this is evident in the sheer time and quantity of investment necessary to accrete cohesive technical strata over new parts of the globe. Once accreted, these installations are physically durable and often have a long period of depreciation, creating both a strong practical and financial inertia. On the other hand, the process also entails the construction of the population itself, since the specific labour processes occurring in these factories require the continual reproduction of labour power at an adequate level of skill. Economic geographer Jamie Gough refers to this as a process of 'socialization' in which '[l]ocally distinctive industrial relations are produced by this *combination* of production and reproduction.' The built environment then emerges from this interrelation, as the 'locally differentiated product of the history of the labour process in the locality.'[37] These are all major reasons why, regardless of the rumours, iPhone production continues at Foxconn's Longhua facility to this day, with the complex still employing armies of workers (likely close to 200,000, which is a bit less than half of its

36 Tronti 2019, p. 59.

37 Gough 2003, pp. 37–9.

peak of around 450,000 in 2010) despite ongoing mechanisation and the opening of new production sites inland and overseas, including the substantially larger flagship complex in Zhengzhou.

This balance of push and pull factors also evolves alongside changes in the power structure and coordinating mechanisms of production systems themselves. The sheer complexity of planetary production seems at first to simply imply that it has grown more cooperative. And this is true, in a sense. As Gough argues:

> … in the very long term, coordination both within capital and between capital and labour has become increasingly important as capitalism has become more technologically sophisticated, as productive investment has become larger scale and more risky, and as the division of labour has become more elaborate.[38]

But none of these trends truly erodes the competitive nature of production as a whole, with the more fundamental absence of coordination visible in the recurrent short-term crises that punctuate the business cycle. Coordination and competition always exist in a codependent tension. Crises therefore demonstrate both the inherent dynamism of production and its inherent instability.

We find ourselves trapped within a carnival that grows more and more chaotic but never seems to end. According to Gough, this instability

> embodies two contradictions. Firstly, because productive investment is made by many capitals without (substantial) coordination, there is a chronic tendency for aggregate capacity in each product industry to expand beyond what the market will bear. Secondly, the expansion of productive capital proceeds through exploiting workers; but it tends to outstrip supply of socially and geographically suitable labour power and thus to shift the balance of power.[39]

These two contradictions were what lay at the crux of that conversation in Shenzhen, where the workers sitting around the table appraised the reality of growing overcapacity and the gradual outstripping of suitable labour supplies, visible to them in the threat of factory closures and the intensification of shopfloor discipline. But such anxieties also took on a more existential character,

38 Gough 2003, p. 104.
39 Gough 2003, p. 247.

evincing the same morbid dread that permeates Xu's poetry. As the balance of class power shifts and the local character of production is transformed, it is not clear what place will be left for the many millions of migrant workers who still compose the majority of the local population in cities like Shenzhen. After a while we just sat quietly in the mirrored labyrinth of the empty bar, watching the carnival of lights and costumes play itself out to its bitter end.

3 The Body of the Economy

Once we descend to the messy practicalities of the production process, the abstract polarity of workers and capital quickly splinters into a far more complex combination of cooperation and conflict that cuts through and between classes. Since different segments of production are distributed across multiple firms each dependent on various labour pools in different parts of the world, high levels of coordination are obviously necessary to maintain the basic integrity of the product line. On the other hand, any given good is ultimately being manufactured for sale on the market and is therefore subject to both extrinsic competition from other firms and intrinsic conflict over the share of profits allotted to its workforce. Because of this, competition intercuts the coordination of supply chains themselves, as epitomised in the prominence of so-called 'arm's length contracting.' In contrast to internationalisation via direct investment or the founding of joint ventures with local firms, the arm's length model requires no investment at all and often entails relatively minimal transfers of technology and training, instead allowing 'multinationals [to] engage in contractual relationships with partner firms without equity involvement' of any sort.[40] In essence, arm's length contracting allows more powerful firms to treat the companies that are effectively their subsidiaries as nothing more than lateral suppliers, eschewing any responsibility for their labour practices and often economising on the costs of direct management, even if the relationship also often involves intricate forms of technical oversight, especially with regard to intellectual property.

This produces a pincer effect for firms located on the lower rungs of such supply chains. For example, in addition to the rising cost of labour and land pressing on profit margins from below, manufacturers based in mainland China have also had their profit squeezed from above by the larger lead firms on whose orders they depend. Different firms at different locations in the chain

40 Suwandi 2019, p. 22.

enjoy differing degrees of power within it. Similarly, different industrial sectors tend to adopt different supply chain structures. Within the field of supply chain studies, production networks are therefore classified by the degree of explicit coordination that exists between firms in a given supply chain, which tend to map onto asymmetries of power and ensuing asymmetries in control over the total value flowing through the chain. In very general terms, supply chains can be divided into two broad governance categories: 'producer-driven' or 'buyer-driven.'[41] Within producer-driven chains, lead firms are themselves manufacturing monopolies and they either have direct ownership of their subsidiaries (this is the case with Tesla, for instance, and is still common in sectors such as steel, led by Baowu Group and ArcelorMittal) or they buy only simpler or ore labour-intensive parts from subcontractors on the open market (for example, Boeing buying components from AVIC subsidiary Chengdu Aircraft Industry Group).

In buyer-driven chains, the lead firms are major retailers (such as Wal-Mart) or global brands that own no factories (such as Nike or Apple). These companies concentrate their design and marketing power in the rich countries and subcontract the entirety of production to manufacturers operating overseas. In more recent years, supply chain studies have further subdivided these buyer-driven chains into more intricate categories based on the exact roles played by firms at various levels of the production process. But the defining feature of all buyer-driven chains remains the fact that market-based relationships between firms largely supplant vertical integration, and, in many cases, arm's length purchase contracts replace direct investment. Naturally, the exact structure of any given product line usually lies somewhere between the two poles. In sectors defined by smaller-scale production, various forms of networked and more heavily dispersed governance are also common, in which each individual firm enjoys a high degree of market autonomy even if it operates within relatively strict price constraints set by that larger market.[42]

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41 Gereffi, Gary, John Humphrey, and Timothy J. Sturgeon, 'The Governance of Global Value Chains', in Gereffi 2018, pp. 108–43.

42 Common subdivisions include: 'Market' governance, where relationships are largely lateral exchanges governed by the price mechanism and power is evenly distributed; 'Modular' governance, where the easy codification of a production process allows lead firms to simply provide their middle-rung suppliers with technical specifications that can be consistently reproduced; 'Relational' governance, where difficulties in codifying the production process require more frequent interaction and more extensive knowledge sharing between lead firms and middle-rung suppliers; 'Captive' governance, where small suppliers are entirely reliant on a small number of large buyers; and 'Hierarchy' governance, which is essentially just the producer-driven chain from the earlier scholarship, defined by

Regardless of the exact scenario, though, lead firms tend to benefit from the ability to shed the segments of their own business that have the slimmest profit margins, all while transferring responsibility for negative externalities (such as environmental costs) to foreign subcontractors. Meanwhile, successful subcontractors have proved able to use embedded kinship networks and local social connections (enabling access to sources of credit, cheap land, or even labour supply) to manage complex and flexible production systems at a lower cost and with a high responsiveness to sudden shifts in demand. These subcontractors are thereby able to secure survivable (and sometimes quite high) rates of profit where lead firms couldn't – or where they simply were not interested in doing so, given the relatively low mass of profit retained within these subordinate segments of the supply chain. But the architecture of the production system ensures that the profit margins for subcontractors remain volatile, since the chains are structured in such a way that the bulk of profits from final sales is funnelled into the balance sheets of lead firms and these firms can also switch their purchases from one subcontractor to another at the drop of a hat. Risking a vast oversimplification, we can argue that the further upstream in the chain of subcontracting for any given product (i.e., toward simpler components and easier portions of assembly) the thinner (or at least less reliable) the profits and the lower the degree of firm autonomy – at least until we reach the level of the most generic base inputs.[43] The trend is maybe clearest in the simple fact that end sales of iPhones bring in more total revenue and profits for a company like Apple than the price of the contract paid to Foxconn to make them, of which Foxconn's own profit is an even smaller share.

In all cases, the chain of subcontracting is vertically nested and horizontally complex. At the global scale, profit incentives almost always encourage new rounds of geographic fragmentation and technical subdivision within the overall chain, accomplished via the relocation (often offshoring) of lower-profit lines and the emergence of structural incentives for subcontractors to shed component work to other, even smaller, subcontractors. The geography of production that results from this process is therefore extremely uneven. Very generally speaking, factories in the coastal areas of China – and, more recently,

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a high degree of vertical integration. (Gereffi, Gary and Fernandez-Stark, Karina, 'Global Value Chain Analysis: A Primer, Second Edition', in Gereffi 2018, pp. 310–12.)

43 There are, however, two crucial caveats to this rule: first, the pattern changes when moving from manufacturing into the simplest components and especially raw materials, where prices are more volatile and profits often see temporary spikes and troughs; and, second, subcontractors providing especially high-tech inputs may appropriate greater profit from the process despite sitting 'upstream' from assembly, in part because they oversee their own supply chains in which the same pattern is reproduced.

in an increasing number of inland centres – source rudimentary components and raw materials from their own upstream subcontractors in poorer parts of the country or even overseas (for example, copper from Zambia) and source more advanced components from higher-tech firms located in neighbouring East Asian industrial hubs (for example, NAND flash storage from South Korea), while also having to negotiate with wholesale traders or purchasing agents independent from the lead firm, possibly based in mainland China but just as often headquartered in Hong Kong or Taiwan, acting as middlemen that siphon even more of the total profit downstream.

In addition to these vertical struggles, such firms are also pitted against one another in horizontal competition over a limited number of contracts. At the same time, however, orders are often distributed across multiple companies, which encourages collaboration to meet the demand on time. More formally: 'Subcontracting offers a compromise between open-market transactions and intra-firm internalisation [which] implies stronger linkages, coordination, and regulation than the open market …' even if it is still governed through competitive contracts.[44] Spatially, this competitive collaboration tends to encourage co-location, in which complementary firms cluster in the same cities or regions, often around a central buyer or a key logistics node. Even in the absence of the classic, vertically-integrated 'company towns,' the process nonetheless produces tightly knit industrial agglomerations in which firms with various specialities can easily communicate and collaborate, either horizontally or in a 'centre-satellite' model where a single large lead firm coordinates the process and assigns orders to nearby open-market suppliers – this is standard, for example, in Samsung's more vertically-integrated supply chain, where clusters of supplier firms physically aggregate around a central Samsung factory complex. The entire process is simultaneously competitive and cooperative, with relatively small coastal manufacturers placed squarely in the lower middle of the profit stream.

Downstream buyers have both greater spatial mobility in deciding where production takes place, since they can shift orders to any location able to offer a lucrative price, and more long-term stability in their balance sheets, since their size gives them access to resources (savings, credit, assets that can be liquidated, etc.) that allow them to survive momentary downturns that would bankrupt weaker firms. By contrast, upstream manufacturers, particularly those in the middle rungs of the chain, must make relatively fixed investments in plant and equipment and often require extensive systems for utilities, transport, and

44 Storper and Walker 1989, p. 134.

housing, all of which increases their spatial fixity. Locally, this produces 'territorial production complexes' or 'territorial industrial complexes' composed of cooperative-competitive manufacturing clusters and affiliated industrial infrastructure.[45] Meanwhile, lower-order suppliers of raw materials are essentially locked in place since their goods are embedded in the land itself, requiring that they construct extractive infrastructure *in situ*. On the other end, the profits siphoned from production ultimately accrue in the metropolitan cores where lead firms are headquartered, spilling out into the economies of the wealthy countries via wages, taxes, the purchase of business services, local investment in real estate, etc.

Even lead firms that own no factories, however, still have embedded investments in fixed capital that shape the territories in which they operate. The retailers invest in storefronts, warehouses, and accompanying land and logistical infrastructure near prospective customers, reshaping the urban geography of the wealthy countries. Similarly, both lead firms within high-tech manufacturing (i.e. Apple) and those within the higher-end services (i.e. Google, which is essentially an advertising company) depend on similar agglomeration effects visible in specialized industrial hubs like Silicon Valley, where they have access to a pool of skilled workers, sources of capital attuned to their product lines, and an entire range of other localised services ranging from legal consultation to catering. These unique forms of fixity that exist among the upper echelons of lead firms have been a key reason why planetary flows of capital are largely administered from an archipelago of 'global cities,' disproportionately located in the wealthiest countries and operating alongside the major military and regulatory institutions overseeing the imperial division of power.[46] Whether in these global cities or their equally global hinterlands, the imperatives of capitalist production ultimately generate a built environment that then evolves according to the changing dictates of profitability.

However, supply chain analysis alone provides only a limited picture of the sociotechnical landscape constructed through this process. As socialist supply chain scholar Intan Suwandi points out, although supply chain studies initially sought to offer a more granular, meso-level analysis of the global economy that emphasised the role played by firm-level decisions within the larger process of development, most supply chain analysis today 'suffers from the opposite shortcoming of hypostatising the firm level of analysis and losing sight of the structure of the capitalist world economy as a whole.'[47] How, then, can we bal-

45 The term is derived from Storper and Walker 1989, Chapter 5.

46 Sassen 2001.

47 Suwandi 2019, p. 24.

ance the obvious agency of the firm with the fact that it is constrained by and operates according to imperatives that inveigh back on it from the emergent social logic of the entire planetary system? We might follow Xu's lead in using a corporal metaphor: if we treat these physical installations as the body of an economic beast encircling the world, then we might say that firms within the same line of production are something like the tissues composing this body, and the territorial industrial complexes formed through the agglomeration of these firms are its specialised organs. Sectoral supply chains then tie these territories together into organ systems spanning the planet, subdivided such that certain functions are downstream from others and central organs consume more than their subordinates. Further, we find that these firms themselves are composed of both cells of fixed capital (i.e. the plant and equipment that make up individual factories) and more easily interchanged fluid elements, including the raw material substrates filtered and processed in their passage through these productive organs, as well as the human labour capable of catalysing the transformation of these substrates into specialised products.

Beyond this, we quickly hit the limits of the metaphor. Although the image stresses that the global economy is quite literally embodied in both the technical systems laid over the crust of the Earth and in the bodies of the proletarians who animate it, echoing the existential tone of body horror evident in Xu's poetry, such organic analogies are dangerously deceptive. On the one hand, this illustration commits the sin of all corporal metaphors, conflating social structures of domination with a seemingly natural hierarchy. But, beyond this, it also implies that the organs of production are relatively fixed in their locations, relationships, and even basic functions. In reality, the body of the economy is something far more eldritch. Its tissues dissolve, fuse to one another, and detach themselves from their respective organs, recklessly and rapidly reorienting into chaotic and formless cathedrals of violence. Every tissue can also split into fractal spores, each of its cells a germ of the greater organism. Even the most holy of hierarchies proves heretical. What first seems to be a central nervous system centred soundly in the halls of high finance and the boardrooms of military-industrial monopolies is, in fact, distributed throughout the body. The very subsidiary clusters that should act as its peripheral nerve centres instead operate with a shocking autonomy, as if it were composed of many warring brains. Glistening new organs congeal along its outermost membranes. Old organs shrivel to rust, with entire belts of once-essential tissue calcified into sharp, vestigial tumours drawing out the heartblood of the ever-sickening imperial core that never quite seems to collapse. And, at last, the most unnatural feature of this body-that-is-not-a-body: the very scale of the demiurge means that its metabolism is inherently autosarcophagous – it eats its own can-

cerous and dying flesh, making every long-abandoned hinterland a prospective site for future industrial colonies, such that its very act of inhabiting the 'natural' environment becomes the cataclysmic construction of a second nature better attuned to its appetites.

4 Total Social Capital

If we think of capital as a system of ritual – not simply the worship of some horror drawn here from the outer dark but instead as the animation of an emergent, demiurgic force through immanent rites of work and wage – then the corporate balance sheet is something like the scripture of our social system. Like any holy thing, it possesses a terse beauty, expressing human domination in concise mathematical glyphs. Its hierophants interpret the murky oracles of profit and loss, sending gold-laden caravans out under the light of an auspicious market moon or calling up hecatombs of human lives to be sunk in sacrifice to the dark god beneath the spreadsheet. We may rage against the superstitious nature of our priesthood, bemoaning 'corporate greed' and the religion of GDP, but their decisions nonetheless determine the course of our lives. The balance sheet decides who eats. The firm is therefore the tabernacle of this faith, the place where the sacrament dwells. And, at first glance, it seems self-evident that the profit recorded in the corporate account was somehow produced within the boundaries of the firm. After all, the presumption that each firm contributes its specific portion of 'value-added' to the final product is the justification given for the extreme disparity in purchasing power between a graphic designer making advertisements for Apple in San Francisco and the factory worker producing actual iPhones in Shenzhen. Concrete power over the production process is thereby transmuted into mystified measures of 'productivity,' which function as a sort of moral discourse.[48] And this discourse seems to capture reality because it does, in fact, describe the material flow of money through the system as a whole. Whether wrenched from invention or commercial arbitrage, money pours from final sales into the company's cof-

48 This practice produces the so-called 'productivity paradox,' in which identical types of work operating with the exact same tools and performed at essentially the same pace are nonetheless subject to the same division in their 'productivity' due simply to the location in which they take place. Thus, as John Smith points out, a barber in Bangladesh is deemed less 'productive' than a barber in Belgium, even if they use the same scissors and have the same number of customers. Smith offers a concise summary and rigorous debunking of the productivity myth in: Smith 2016, pp. 171–86.

fers, seemingly made possible by some miracle of the labour process occurring in that particular firm. This miracle – usually referred to as 'innovation' or, in more technical terms, 'total factor productivity' – is what allows the money of an initial investment to become more money. In other words, capital always appears to spring forth, fully formed, from the brain of the balance sheet.[49] When aggregated across all firms, these many small miracles of parthenogenesis sum up to the process of accumulation, on which all else relies like the slow and certain seasons of the Nile.

Just as profit seems to emerge from the bounded productive activities of each firm, so too does investment appear to derive from specific firms or even individuals. Despite being funnelled through various financial institutions, the money invested has an ultimate owner to which all augmentations of the initial sum are due. In neither case is this appearance wrong, exactly, only partial, demonstrating the private appropriation of the products of social labour. The very existence of vast, planetwide supply chains is a demonstration of this fact. Similarly, the sheer scale of production requires the pooling of private investment funds in various financial oligopolies that are, of necessity, intimately linked to the machinery of the state. While traditional banks such as JPMorgan Chase or the Industrial and Commercial Bank of China remain the pillars of this system, the tension between its social scale and private character is maybe better represented by the rise of asset management firms such as BlackRock and Vanguard, which reproduce something similar to the arm's length relationship within the financial realm. Rather than owning their investments outright, they instead oversee the deployment of capital owned by others and pooled in various investment funds, many of which are simply indexed to a certain market segment or to the market as a whole. The asset management companies themselves only make a profit on fees 'charged as a fixed percentage of assets under management (AUM),' which encourages them to both increase

49 Writ large, the universal expectation that money can become more money through investment becomes the idea that capital itself has a 'cost,' its minimum expected return, which is loosely rendered in the real interest rate. When individual firms are appraising their returns, then, they are not simply measuring profits as any increase in revenue over costs, but specifically as an increase in excess of the interest they'd earn on relatively 'safe' passive investments (for example, the 'fixed income' from bond purchases). Meanwhile, when choosing whether to pour money into a given firm or not, outside investors are also appraising the prospective profits of that company in contrast to others. Nor is this just a matter of comparing like to like by forecasting potential returns from similar companies in the same business. Since their money is relatively mobile, it can just as easily alight from one line of production to another or be sunk into various non-equity 'asset classes' (for example real estate) that range in risk.

their AUM as much as possible and diversify their holdings.[50] The circuit of capital is thereby pared back to its sparse, mathematical minimum.

Though the sector is dominated by only a handful of companies, these firms are engaged in intense competition with one another and, more importantly, enforce competition throughout the economy as a whole. Since their investments in any individual firm tend to be relatively large and relatively long-term, this also gives them a stake in corporate governance and the overall wellbeing of the firms they hold shares in:

> As the asset management companies are effectively permanent owners, equally permanent interconnections condense between these financiers and industrial corporations. These relationships are organised through the asset managers' 'stewardship divisions,' which centralise oversight of industrial corporations. This includes coordinating the asset management firms' share voting strategies, as well as collaborating with portfolio companies to implement governance reforms, influence board composition, approve executive compensation, and supervise strategy.[51]

Within the US, asset management firms are often able to exert a substantial influence on the decision-making of a firm even while holding only a relatively small portion of total shares because the remainder of the shares are so thoroughly diluted. In mainland China, however, managerial groups, domestic financiers, and holding companies affiliated with various state institutions (often local or provincial governments, sometimes the central state) almost always retain controlling shares in leading companies. Direct control by major asset managers tends to be similarly diluted in Taiwanese and South Korean firms as well. At the global scale, then, the power of asset managers operates in a minor register through passive shareholding (with some influence on corporate decision-making). Their power is mostly exerted over the core of the planetary manufacturing complex indirectly, through control of the lead firms in the wealthy countries and through asset managers' more general influence in shaping the overall market.

The largest of these firms as measured by AUM are mostly US multinationals, with the remainder European. By the early 2020s, US asset managers BlackRock and Vanguard had come to hold the leading positions, with AUMs double those of their nearest competitors. As of March 2022, BlackRock had an AUM

50 Gibadullina 2020.

51 Maher and Aquanno 2024, p. 180.

just above 9.5 trillion USD, and Vanguard 8.1 trillion USD.[52] Combined, this accounted for slightly less than a fifth of world GDP. But, although this is an often-quoted measure that is a powerful demonstration of scale, it is nonetheless somewhat irresponsible, conflating a flow (GDP) with a stock (AUM). If we instead compare like and like, we find that the combined AUM of these top two firms amounts to a little bit less than 4 percent of total global asset values (also a stock measure) at the end of 2021 – not quite as jaw-dropping, but certainly not insubstantial.[53] And the figure represents an even more expansive degree of control over capital markets within the US, where a large portion of the world's leading firms are headquartered: overall, 'the financier class have established themselves as the direct owners of almost two-thirds of US corporations …'[54] Similar to the subcontracting structure of manufacturing, this model of finance is premised on a cooperative-competitive autonomy wherein lead firms (in this case asset managers) exert their ownership 'through an arms length process, where the firms themselves only become aware of their largest shareholders after the securities filings of investment funds become publicly available.'[55] Altogether, the rise of asset management has therefore not only contributed to the deepening of wealth inequality both within and between countries, but has also introduced more complex forms of inequity within the financial and managerial systems that administer accumulation as a whole.

The integration of planetary production and the emergence of this 'new finance capitalism' are ultimately two sides of the same global conquest.[56] The rise of asset management companies therefore illustrates the more general hierarchy of production itself, much as the rise of finance capital in the nineteenth century illuminated the contours of classical imperialism. The meso-level analysis of individual corporations favoured by the supply chain theorists proves entirely inadequate here, as Marx himself observed: 'the circuits of individual capitals are interlinked, they presuppose one another and condition one another, and it is precisely by being interlinked in this way that they

52 ADV 2023 'World's Top Asset Management Firms', *ADV Ratings*. https://www.advratings.com/top-asset-management-firms

53 GDP based on World Bank Data (indicator NY.GDP.MKTP.CD) and the IMF's estimated 2022 GDP growth as presented in its 2 November 2022 World Economic Outlook report. Total asset values are Credit Suisse's measure of 'global wealth,' including both financial and non-financial assets, as well as assets held by households, as described in: Anthony Shorrocks, James Davies, Rodrigo Lluberas 2022 'Global Wealth Report 2022', *Credit Suisse*. https://www.credit-suisse.com/about-us/en/reports-research/global-wealth-report.html

54 Gibadullina 2020, p. 18.

55 Gibadullina 2020, p. 19.

56 Ibid.

constitute the movement of the total social capital.'[57] The grand financiers of Wall Street standing astride their unthinkable expanse of assets, the brand and design firms in Cuptertino or Beaverton sourcing from the Chongqing and Bắc Ninh factories run by contract manufacturers based in Taipei or Singapore, or the sub-sub-subcontractors plucking pale bolls of cotton from the black soil of inland Gujarat or prying cobalt from the yellow-grey earth around Kolwezi in the southern hinterlands of the Democratic Republic of Congo – all are but moments in the circulation of this total social capital, which '[t]aken in its entirety … is a form of the reproduction process' of capitalist society as a whole.[58]

It is therefore only in the world market that 'production is posited as a totality together with all its moments, but within which, at the same time, all contradictions come into play.'[59] For this reason, the world market is 'where the total social capital … fully affirms itself as the alienated subject of social production' and therefore serves as the supervening force commanding the organs of production through its imposed imperatives.[60] Similarly, firms, territorial industrial complexes, entire productive sectors, or individual countries all exist only as parts of this total social capital.[61] They do not and cannot function as distinct local 'types' or 'models' of capitalism but instead constitute the local instantiations of an inherently and immediately planetary process of social reproduction. The unity of this process is established through the very cooperative-competitive struggle outlined above, whereby the entire interlinked chain of firms – as the tissues tying together the world market – grapple with one another to appropriate greater shares of the total surplus produced by all of society, which appears in the form of firm-specific profits, thereby establishing a perpetual tendency toward the formation of a general rate of profit that is nonetheless always cast into disequilibrium by its own centripetal force effecting changes in the production process. As a result, there is no way to fully separate out the economic activity occurring in one firm or country from that occurring in any other.

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57 Marx 1978, p. 429.

58 Marx 1978, p. 430.

59 Marx 1973, p. 227.

60 Caligaris, Gastón, 'The Global Accumulation of Capital and Ground-Rent in 'Resource-Rich' Countries', in Charnock and Starosta 2016, pp. 56–7.

61 We can also state this in a more provocative fashion: there exists no 'American capitalism' or 'Chinese capitalism,' only a single, global society forcibly made subservient to capital, the alienated subject of social production. What can be thought of as a distinctly 'Chinese political economy' is, therefore, only this alienated subject in its partial aspect, operating within a particular territory and through a particular people.

5 Geographic Industrialisation

As a result of this, the relocation of firms to the Chinese interior cannot simply be reduced to the aggregate outcome of many firms' individual strategies to secure a greater profit, nor even to state planners' attempts to mobilise industrial policy to channel these investment decisions in a way that prioritises technical upgrading or the fostering of industries considered crucial for future development. Companies and state institutions obviously make 'strategic' decisions and, if these agents are sizable enough, their choices can have a clear impact on larger-scale trends. Ultimately, though, a company's choices are never entirely its own. They are local responses to changes in the geographic, demographic, and technical megastructures of global production, as filtered through the corporate balance sheet. In other words, these agents exist much like an individual organism exists within a larger ecosystem. While the lone organism certainly has agency, this agency is dependent on and constrained by the actions of other agents and the emergent imperatives of the entire system that arise from these interactions. Meanwhile, both its immediate stimuli and its reaction to those stimuli will be largely parochial – even while both are simultaneously manifestations of higher-order, system-wide phenomena. What seem to be individual business decisions or state development strategies are therefore unified at a higher level, simultaneously expressing local strategies and a systemic agency that supersedes that of these lower-level units. This unification occurs through the chaotic process of competitive investment, industrial relocation, and technical transformation that tends toward the formation of the general rate of profit even while continually disrupting the realisation of such a rate.[62]

Throughout this process, geography is never incidental, nor is it simply a second-order expression of access to raw materials, end markets, cheap labour,

62 Though this invokes an image of liquid capital pouring into only the most profitable outlets, the accumulation process is never actually this frictionless. Investment decisions are shaped by limited information (for example, lack of familiarity with other industries), by interpersonal ties (thus the persistent importance of 'networking'), and by simple inertia. They are also always speculative and experimental since forecasts of prospective profit may fall short. Similarly, both the risk and the horizon of expected returns differs vastly between industries. Even more important, however, is the fact that investment itself changes the relative profitability of different lines by financing various changes to the production process itself. Thus, even as competition forces each firm to try and approximate a tendential mean of profitability, this dynamic itself also generates a disequilibrium that 'systematically drives profit rates away from sectoral or national averages' (Storper and Walker 1989, p. 49).

or abundant land. Instead, since industrialisation produces the built environment by depositing particular infrastructures in particular places at particular times, the activity of a region's industries literally creates that region, remaking originally disparate and disconnected localities into a functionally cohesive social territory. After all, production requires substantial investment in fixed capital stock, which is composed of the plant and equipment that make up individual factory complexes as well as necessary infrastructural amenities like roads, ports, and electrical grids. Further buildout of the housing stock and other reproductive features of the social environment – i.e., schools, hospitals, parks, restaurants, shopping malls – both follow from this and serve as investments in and of themselves, playing a similar, albeit more speculative role in seeding new territorial complexes. This process of 'geographic industrialization' is both iterative, requiring multiple rounds of development and expansion atop pre-existing strata of concrete and steel, and endogenous, driven by the compounding accumulation of capital within the region rather than 'the efficient allocation of plants across a static economic landscape' defined by 'the exogenous placement of resources and consumers,' as expected in orthodox economic models founded on the notion of comparative advantage.[63] Writ large, we can thereby trace the progress and structure of the great enclosure in the material ecosystems that capital crafts for itself, as aleatory social forms take on physical shape in space. Subsequent restructurings of the already-implanted total social capital are similarly visible in the reconstruction – or simply the decay – of the built environment.

But these regions also only exist in relation to one another. As illustrated above, each territory of capital's technological exoskeleton is bound to the others through competitive-cooperative chains of production administered via the global market. The physical carapace of society also only forms through the deposition of fixed capital at specific points in time, with the flow of demolition and development quite literally etching history into space. This temporal aspect is an important factor structuring both the dynamic relationships that these territories have with one another and the instability inherent in the social system as a whole. As economic historian Robert Brenner points out, 'investment tends to occur in waves, or blocs, of interrelated placements of fixed capital, their constituent elements embodying technologies of roughly the same vintage.'[64] Thus, firms within a given territorial industrial complex also tend to be somewhat locked in place in both a geographic and temporal sense. As soon

63 Storper and Walker 1989, p. 70.
64 Brenner 2006, p. xxi.

as they have invested in a physical facility, they take on the burden of that facility's location and the set (but often initially unclear) rate of depreciation and obsolescence of its affiliated equipment. As technical upgrading spreads across the product line and new industrial clusters emerge in fresh locations, older firms therefore find themselves stuck in more expensive areas and forced to use less productive techniques. In certain cases, a third-order industrialisation even emerges at this point, in which firms burdened with obsolete equipment sell it off at a discount to weaker firms in dependent countries, where it is used in sheltered markets to serve limited domestic demand – the advanced firm attempting to regain its competitive edge against new challengers by exporting the sunk costs still embedded in old fixed capital to companies otherwise locked out of the product line entirely.[65]

In other words, while the initial boom in capital stock creates enormous profits and generates rapid economic growth, the future depreciation of that same stock also threatens to create a deadly overhang, bankrupting the least mobile and most vulnerable firms while driving down the profits of those able to survive in the face of intensifying competition. Brenner summarises the process:

> the early-developing bloc of capital tends, for an extended period, to dominate its own markets, discouraging challengers; the newly emerging bloc of capital, repelled by the earlier bloc from its markets, ends up profiting by means of developing new regions and exploiting new labour forces to an important degree in separation from the earlier developer; and, finally, the capitals of the later-developing blocs increasingly challenge those of the earlier-developing bloc by combining lower-cost inputs and equal or more advanced technology, making for an intensification of inter-capitalist competition that undermines the ability of large masses of fixed capital investments to realise themselves, leading to the onset of over-capacity and declining rates of profit.[66]

Crucially, this process applies both to international divisions between productive blocs and to the territorial divisions visible within individual countries. In the latter half of the twentieth century in the US, the most salient geographic trend was a decline in manufacturing across the Midwest and Northeast, with

65 Fitzsimmons, Alejandro and Guevara, Sebastián, 'Transnational Corporations and the 'Restructuring' of the Argentine Automotive Industry: Change or Continuity?', in Charnock and Starosta 2016. p. 200.

66 Brenner 2006, p. xxi.

new centres emerging further south in California and Texas. In China, then, the Pearl River Delta complex is simultaneously a 'later-developing bloc' within the total social capital and 'an early-developing bloc' relative to emerging industrial clusters in the Chinese interior.

New competitive pressures therefore emerge from both above and below. On the one hand, China's coastal metropoles are finding themselves in increasingly direct competition with firms located in the higher-income countries – especially those that arose in the previous cycle of territorial development in South Korea and Taiwan. Both Beijing and Shanghai, for example, have emerged as 'postindustrial' centres of finance, business services, research and development, high-tech production, and high-end consumption. In part, these cities have been able to leapfrog up the value chain because of the nature of their manufacturing base. While the hubs further south in Zhejiang and Guangdong were traditionally oriented around the light manufacturing of consumer goods, for example, Shanghai pivoted into heavy manufacturing early on, becoming a centre for shipbuilding, steel, auto manufacturing, construction equipment, and the production of shipping containers, all of which enabled Chinese firms to play a central role in the global logistics boom and to rapidly climb into higher-value segments of the supply chains for heavy industry.[67] This was bolstered by the city's role as the mainland's most robust financial centre, making it a hub for the domestic capital market and other business services. By 2021, Shanghai had surpassed both Hong Kong and Tokyo to become the world's most expensive city, and by 2023 it ranked fourth in the world in its total share of billionaires (behind Beijing, Hong Kong, and New York), at least according to Forbes.[68]

Similarly, Beijing used its administrative status as the seat of the central government to push through the closure or relocation of heavily polluting industries from 2008 onward, accompanied by the aggressive clearing of the 'low-end population' (低端人口) in a series of redevelopment campaigns in the city's poorer neighbourhoods.[69] This left behind R&D and high-end manufacturing sectors such as aeronautics and semiconductors, alongside the cor-

67 Cowen 2014 p. 67.

68 Williams, Ollie A. 9 April 2021 'Shanghai is Now the Most Expensive City in the World', *Forbes*. https://www.forbes.com/sites/oliverwilliams1/2021/04/09/shanghai-is-now-the-most-expensive-city-in-the-world/?sh=4f33663b3b21; Zamora, Gigi 8 April 2023 'The Cities with the Most Billionaires 2023', *Forbes*. https://www.forbes.com/sites/gigizamora/2023/04/08/the-cities-with-the-most-billionaires-2023/?sh=ebb685511473

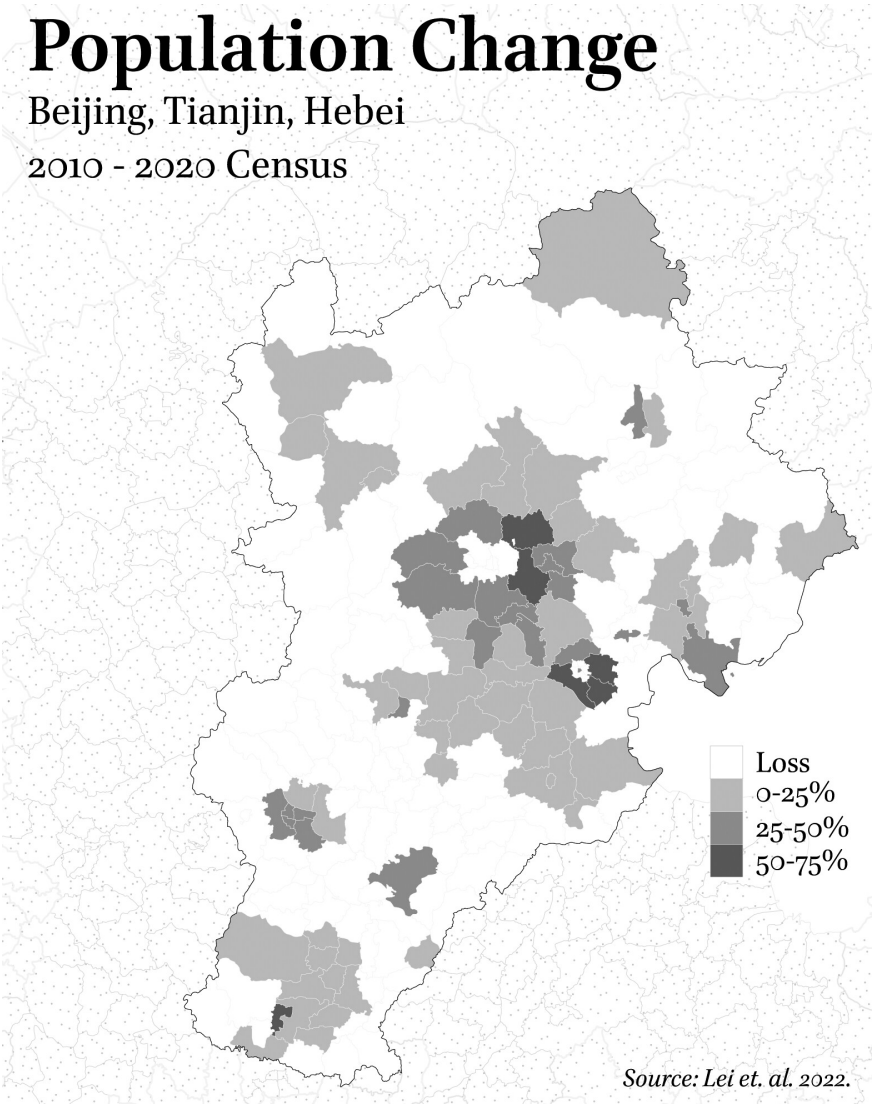
69 Lu Bu [卢布] 24 November 2017 'They are indeed "low-end labour-power," but who isn't?' [他们就是'低端劳动力'，但谁不是呢], *Tootopia* [土逗公社], archived on *Chuang Blog*. https://chuangcn.org/2018/01/low-end-population/

porate headquarters, private equity firms, and major universities that the city had long been known for. In both cases, nearby municipalities – Tianjin and Shijiazhuang within the Beijing metro, and Ningbo and the Suxichang metro area in the Yangtze River Delta surrounding Shanghai – have played equally important coordinating roles, especially as sites for the relocation of higher-end heavy industries. Population dynamics in Beijing, Tianjin, and surrounding Hebei illustrate the underlying trends, the most obvious of which is widespread population loss throughout the countryside paired with rapid urban growth. But, as Chinese demographers have noted, this urban growth itself tends to take on a 'donut' shape, with the most rapid gains concentrated in a suburban ring around the central city. In fact, due to skyrocketing property prices, the downtown core actually sees population loss as poorer residents are forced to leave and new office tours and shopping complexes are constructed in their place (see Map 7).

While the higher-end industries left in Beijing and Shanghai face less competition from the 'later-developing blocs' of the interior, they are themselves later-developers relative to established conglomerates elsewhere. The notion that there exists a trade war between the US and China grasps the outlines of this conflict but does not adequately capture its intricacies. On the one hand, it's true that Chinese firms have begun to pose increasingly direct challenges to US firms in certain sectors or within particular markets.[70] Construction equipment manufacturing is one obvious case. In the 2000s, the top-ranking construction equipment manufacturers were all US, Japanese, or European firms. The sector had long been dominated by US manufacturer Caterpillar, which held 26.5 percent of global sales in 2003 and 24.2 percent in 2008, followed by Japanese firm Komatsu, with 12.2 percent and 11.7 percent in the same years.[71] Many of these firms had outsourced production early on (Mexico, Brazil and South Korea had been among the important recipients) and continued to do so as China opened to foreign investment. But, in contrast to the garment sector, supply chains in construction equipment tend to be more producer-driven and vertically integrated, with lead conglomerates retaining high-end assembly

70 Ho Fung-Hung (2022) offers an overview of where, exactly, these corporate conflicts of interest lie and how they have changed over time.

71 Data here and below is from the annual Yellow Table rankings compiled by *International Construction* magazine. For a summary and time-lapse of twenty years of data from the ranking, see: Gerrard, Neil 2 March 2023 'How the hierarchy of the top construction OEMs has changed over 20 years', *International Construction*. https://www.constructionbriefing.com/news/how-the-hierarchy-of-the-top-construction-oems-has-changed-over-20-years/8026422.article



MAP 7 Population change, Beijing, Tianjin, Hebei, 2010–20 census

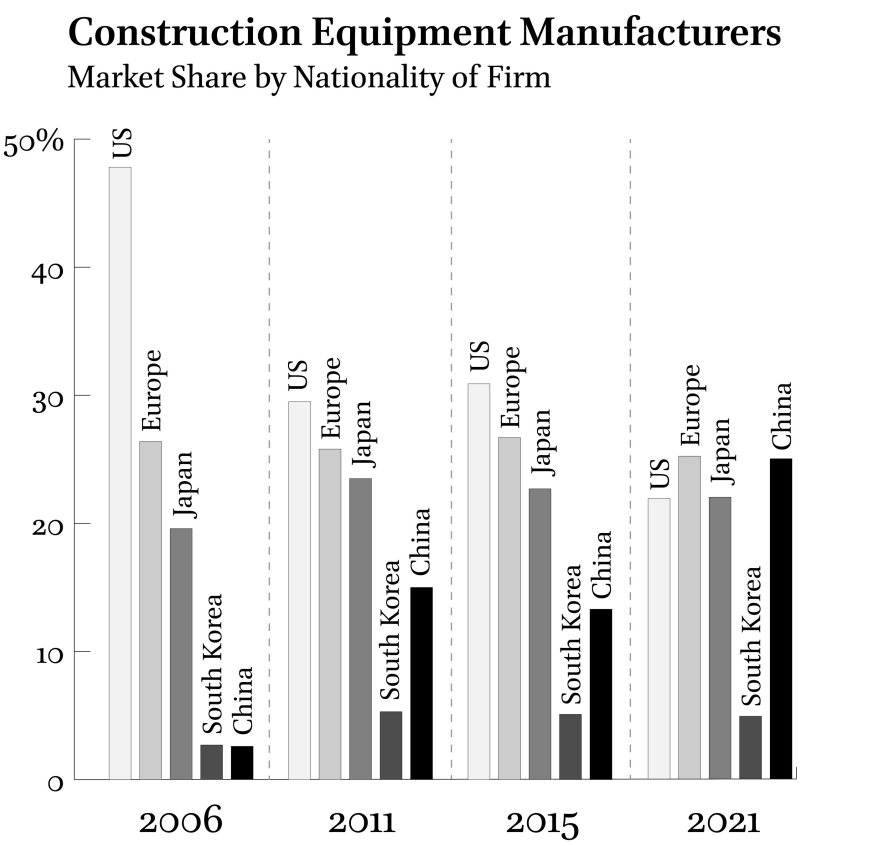
plants in their home countries and often directly owning their overseas plants, only contracting out the manufacturing of their inputs and lower-end product lines.

Over the course of the 2010s, however, the infrastructure boom in China (as well as the rising importance of Chinese construction and engineering contractors in the global market) was accompanied by the rapid ascent of Chinese firms such as XCMG, Sany and Zoomlion. These firms then established their

own producer-led supply chains, with production sites distributed throughout the country and headquarters concentrated in new construction capitals such as Changsha. Though the established conglomerates in the wealthy countries mobilised their monopoly powers against these new competitors – with Caterpillar, Komatsu, and Volvo famously sued in an antitrust lawsuit for teaming up to bar a Chinese competitor from the US market – Chinese firms drew on both their cost-competitiveness and their advantages in partnering with Chinese construction contractors to gnaw away at the power base established by the old generation of lead firms.[72] They were particularly successful in their exports of construction equipment to lower-income markets because of their lower costs and because Chinese construction and engineering firms were often already employed in major infrastructural projects in such countries. By the early 2020s, the second-tier US and European producers such as John Deere, Volvo, and Liebherr (and rising South Korean challenger Doosam Infracore) had been entirely displaced, with Chinese firms occupying third, fourth, and fifth place behind Caterpillar and Komatsu. The size of Caterpillar's lead had also declined substantially, with its share of global sales plummeting in the latter half of the 2010s, from 21.6 percent in 2015 to 13 percent in 2021. Notably, however, slowing growth in the Chinese market over the subsequent years would then see Caterpillar and Komatsu bolster their leads, as revenues declined for their Chinese competitors.

But the construction sector is also in many ways an outlier and, for the most part, over the course of the 2010s, the conflict between US and Chinese firms could not even be considered a 'trade war' in the classical sense. Rather than addressing outright competition, US tariffs against China have tended to focus more on questions of national security exposure and on higher-tech sectors in which Chinese firms are not yet competitive. In other words, the conflict has been less a head-on battle over market share and more a process of geopolitical policing designed to secure the apex position of the US within the world market by diversifying its imports and undercutting Chinese firms' ability to acquire technologies within the sectors that could pose a more direct competitive threat *in the future*. Rather than targeting companies operating in lower-end sectors where Chinese firms are already dominant (such as pork or steel) or are nearly dominant (such as construction equipment), the most

72 Greyson, Wayne 29 January 2015 'Antitrust suit alleges Caterpillar, Komatsu and Volvo conspired to bar Chinese construction equipment from U.S. market', *Equipment World*. https://www.equipmentworld.com/business/article/14954438/antitrust-suit-alleges-caterpillar-komatsu-and-volvo-conspired-to-bar-chinese-construction-equipment-from-us-market



Source: International Construction Yellow Tables

FIGURE 11 Construction equipment manufacturers: market share by nationality of firm

aggressive measures have instead been designed to prevent Chinese firms like Lenovo, ZTE, and Huawei from advancing into the upper rungs of microchip production or extending their investments in telecommunications infrastructure to North America and Europe.[73] Meanwhile, claims of decoupling and supply chain diversification in the wake of the pandemic have also proved to be exaggerated. By the end of the decade, the impact of these policies on

73 While the Trump administration did impose tariffs on steel and aluminium production, they only had a minimal impact on Chinese producers and were instead felt more strongly by firms in Japan, Europe, Canada, and South Korea. In part, this is because Chinese firms had ascended to leading positions within the global steel industry in a period when special trade protections for the industry had already been common in the US, with over 90 percent of steel imports from China already subject to special tariffs

overall trade integration between China and the US had been minimal. In fact, imports of Chinese goods not directly affected by new tariffs skyrocketed after trade recovered from the initial shock of the pandemic, somewhat balancing declines in the affected sectors.[74] Instead of a lateral trade war with an equally powerful competitor, then, the passage of anti-Chinese business legislation in the US is better understood as a geopolitical measure intended to enforce the implicit imperial order by punching down at any firm that might pose a potential threat in the future.

6 Supply Chain Struggles

At the same time, however, a genuine trade war has been occurring in the middle ranges of the supply chain. Over the course of the last three decades, coastal Chinese firms have faced and often overcome simultaneous challenges from above, in the form of the advanced and established conglomerates of Taiwan and South Korea, and from below, in the form of up-and-coming, less-advanced competitors from inland China and emerging industrial hubs in South and Southeast Asia. At its core, this is a conflict first over positioning within planetary supply chains and, second, over the distribution of profits throughout the entire production process, with firms at various points deploying new technologies, new organisational systems, and new locational strategies in an attempt to appropriate a greater share of the money coursing through the product line. Since the sum of profits is ultimately limited by final sales, this throws firms into a multilateral struggle. They must outcompete others operating at the same point in the chain and simultaneously outmanoeuvre the more powerful firms above them, all while retaining control over their own subordinate suppliers below.

Three major weapons are deployed in this battle. First is the 'spatial fix,' where greater profits can be gained by relocating production to cheaper sites – most often used by lead firms to discipline suppliers and ensure a continuing race to the bottom. Second is a 'technological fix,' where further mechanisation

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prior to the Trump-era regulations. (Bown, Chad P. 7 March 2018 'Trump's Steel and Aluminum Tariffs are Counterproductive, Here are 5 More Things You Need to Know,' *Peterson Institute for International Economics*. https://www.piie.com/blogs/trade-and-investment-policy-watch/trumps-steel-and-aluminum-tariffs-are-counterproductive)

74 Bown, Chad P. 20 October 2022 'Four years into the trade war, are the US and China decoupling?', *PIIE*. https://www.piie.com/blogs/realtime-economics/four-years-trade-war-are-us-and-china-decoupling#_ftn1

or outright automation of certain production processes enable a firm to create more output per unit of labour, giving it a (temporary) cutting-edge advantage against those stuck using older techniques. This strategy is used by both lead firms and subordinates but is especially important to the lead firms' attempts at industrial upgrading. In the extreme, technological fixes can even see the company pivot into adjacent product lines. Third is an 'organizational fix,' where corporate reorganisation is deployed against competitors, as when a successful subordinate firm consolidates into a larger oligopoly by absorbing less profitable competitors at the same point in the chain while also pulling more of the total production process under its direct ownership, thereby securing more bargaining power against the brand monopsonies. But it is also visible in the opposite case, when lead firms divest themselves from their suppliers, instituting new forms of dependence through arm's length contracting. This final fix is particularly important in enabling firms to shift between product lines and even build out lucrative side businesses in finance and real estate, which may even become their primary sectors in the future.[75] In reality, the three are almost always intermixed to one degree or another.

While the spatial fix is obviously central to the emergence of new territorial industrial complexes, technological and organisational fixes tend to play a larger role in the upgrading of existing territories. Ultimately, even though these appear to be three distinct strategies chosen by individual corporations, they are in fact difficult-to-disentangle aspects of the total social capital's own ongoing technical and territorial evolution. The 'choice' of whether to roll out new technologies or relocate production, for example, is hardly a choice when failing to do so means a firm will fall into bankruptcy or be absorbed by a competitor. Similarly, just as supply chains themselves are defined by both competition and cooperation, the struggle to obtain greater shares of profit also takes on a somewhat symbiotic character, visible in things like joint ventures – which themselves express a combination of all three fixes, weighted differently for each of the participating firms. A good framework for understanding these supply chain struggles is offered by political economist Ashok Kumar, who tracks recent shifts in the structure of the labour-intensive clothing supply chain by measuring changes in the 'degree of monopsony power' (DMP) held by the leading brands. In the classical 'buyer-driven' chains of the 2000s, the DMP of the lead firms was extremely high, since 'fragmentation and low capital investment in garment and footwear value chains had created low barriers to entry, resulting in bidding wars between thousands of smaller firms from around the world,'

75 Kumar 2020.

and thus allowing major brands and retailers to command immense power over the entire chain.[76] These conditions also helped to create the conventional image of the average supplier as a 'sweatshop,' defined by rudimentary, labour-intensive production methods and the direct domination of workers by manager-owners.[77]

But, by ensuring that production was increasingly concentrated in a handful of low-cost, high-competition locations, the very success of global brands and retailers in pushing down prices would ultimately create the conditions for new contract manufacturer monopolies to emerge. The cutthroat ecosystem produced by these buyer-driven chains ensured that only the most ruthless suppliers would be able to turn a profit. As fewer firms were able to compete, they were swallowed up by larger rivals: 'In place of the numerous small firms grew the now-ascendant mega-producers in the most valorised sections of the sector, concentrated in a handful of labour-rich countries.'[78] It is here that something closer to an actual trade war can be found, today pitting mainland Chinese firms not against US brands but against the Taiwanese contract manufacturers and South Korean conglomerates that had been so central to China's own entry into global markets. The model of contract manufacturing for buyer-driven chains had itself been piloted in Taiwan, where dense networks of small-and-medium size enterprises (SMEs) began to dominate consumer goods production from the 1970s onward.[79] Foxconn itself is a case in point, illustrating the basic pattern that Kumar identifies. Terry Gou, a college graduate who had worked in a rubber factory, founded the company in 1974 in a suburb of Taipei with a few thousand dollars in startup funds. The firm specialised in ancillary plastic parts used in electronics manufacturing. The company remained extremely small until 1980, when it received a massive contract from

76 Kumar 2020, p. 10.

77 For garments, the timeline is complicated by the expiration of the Multi-Fibre Agreement (MFA) in 2005. The MFA had created a quota system designed to distribute contracts more equitably to garment suppliers in different parts of the world, slowing the race to the bottom by mandating that a certain portion of production take place in higher-cost locations. The expiration of the MFA fully liberalised the sector, leading to the rapid closure of suppliers in many parts of the world as brands and retailers, now unhindered by quota requirements, sought to buy from the cheapest and most reliable suppliers, predominantly located in Asia. Ironically, this centralisation of production, combined with intensified competition, then created the conditions necessary for larger monopoly suppliers to emerge.

78 Kumar 2020, p. 11.

79 At the same time, however, upstream inputs were dominated by large 'national champion' conglomerates, many of which traced their roots to the old state-owned industrial sector affiliated with the Nationalist Party.

Japanese company Atari to produce the joystick for its trademark console.[80]

SMEs composed some 60 percent of Taiwanese export sales in the 1980s. But, as labour-intensive firms operating on thin profit margins, they were especially sensitive to increased costs and were also capital-light, allowing them to relocate with relative ease. They were therefore among the first to begin moving production to mainland China (and Southeast Asia) in the subsequent decades. Initially, 'industrial clusters moved en masse from Taiwan to the mainland' and, once there, 'became even tighter and more exclusive, inspiring the sociologist Ming-chi Chen to dub them "fortresses in the air" …'[81] Many also used the opportunity to begin scaling-up their own production capacity. Foxconn opened its first mainland facility in Shenzhen in 1988, helping to anchor the cluster that would later develop into Foxconn City.

Despite collaborating with local officials on the mainland, however, transplanted Taiwanese businesses mostly contracted with other Taiwanese businesses and preferred to hire Taiwanese managers. They were also notoriously cruel to their staff, as one former factory worker recalled:

> The biggest cheapskates were the fucking Taiwanese bosses. They were the harshest managers. Can working for them even be called work? They would often insult and beat you, threatening to fire you the moment you disobeyed, or hitting you whenever things didn't go 100 percent according to plan … they also kept brutal security guards.[82]

In contrast to firms from Germany and Japan, greater cultural familiarity ensured that Taiwanese businesses could prosper without having to form joint ventures with mainland counterparts. They were thus able to drive down labour costs by harshly disciplining their mainland workers while also warding off competition by refusing to partner with existing firms from the mainland attempting to enter the same lines of business. This then allowed them to grow into substantial conglomerates in their own right, with markets such as footwear divided between a few major contract manufacturer oligopolies, commonly referred to as monopolies – though here and elsewhere the term 'monopoly' should be understood not to refer to the muting of competition but instead to a certain type of large-scale power over production that sup-

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80 Balfour, Frederik and Culpan, Tim 9 September 2010 'The Man Who Makes Your iPhone', *Bloomberg*. https://www.bloomberg.com/news/articles/2010-09-09/the-man-who-makes-your-iphone#xj4y7vzkg

81 Rigger 2021, p. 114.

82 Hao Ren, 'Looking Back on 20 Years in Shenzhen's Factories', in Chuang 2016.

presses competition locally and, in so doing, intensifies competitive pressures within the sector as a whole and even across the broader economy.[83] Nonetheless, cultural familiarity cut both ways. Mainland workers were able to learn from Taiwanese engineers and managers, often enabling them to start their own enterprises. Similarly, mainland firms were also able to hire skilled workers from Taiwan, eventually even actively poaching them from Taiwanese firms in leading industries.

Eventually, cracks formed in the walls of the fortress. Over the course of the subsequent decades, rising competition forced Taiwanese companies to pursue aggressive consolidation.[84] Mainland firms had begun to take on more and more low-end assembly work, slowly advancing into higher-tech lines. By the 2010s, smaller Taiwanese firms operating in mainland China had seen their share of total sales decline substantially, with the worst-performing SMEs either being run out of business by more competitive newcomers from the mainland or swallowed up by the growing contract manufacturer monopolies.[85] Nor was this simply an effect of the Great Recession, since the trend had already been building over the preceding decades, with the Taiwanese Ministry of Economic Affairs reporting a net loss of 18,000 SMEs between 2006 and 2007 alone.[86] In contrast, the emerging monopolies were able to survive not only because of their greater weight in the market or their ability to cut costs by producing lower-end components in-house, but also because they had doubled down on R&D, taken on higher-value activities such as design, and rolled out new shopfloor technologies to enhance their productivity. Many thereby

83 Some might object to the use of the terms monopsony and monopoly to simply describe any retailer or design firm with significant market share or any large 'mega-producers' that wins a similarly large share of production contracts, arguing that the textbook definition of a 'monopoly' is the absence of competition. Yet this textbook definition is dubious, in the sense that it fails to describe the actually-existing monopolies and monopsonies that have come and gone throughout many periods of capitalist development, which have always had an imperfect character. It is only in extremely rare cases that these firm structures have, in fact, suppressed competition outright and relied exclusively on 'monopoly rents.' The more technically correct terms are oligopsony and oligopoly. However, I follow Kumar here in also using monopsony and monopoly as descriptions of market power rather than descriptions of a malfunctioning or suppressed market. For the competition-enhancing characteristics of classical 'monopoly' companies, see: Maher and Aquanno 2024.

84 Rigger 2021, pp. 47–108.

85 Huang, Elaine 11 January 2020 'The Forces Behind Taiwan's Stagnant Wages,' *Commonwealth Magazine*. https://english.cw.com.tw/article/article.action?id=2638

86 Lai, Jerry 19 December 2007 'The Alarming Decline of Small- and Medium-sized Enterprises,' *Commonwealth Magazine*. https://english.cw.com.tw/article/article.action?id=1419

evolved from Original Equipment Manufacturers (OEMs), which simply produce according to (patented) designs provided by a lead firm, to Original Design Manufacturers (ODMs) capable of producing, designing, patenting, and marketing their own 'white label' products, which buyers can simply buy in bulk and slap their own brands on. More rarely, ODM firms enable the emergence of Original Brand Manufacturers (OBMs) which take on all the same tasks while also owning their own brand names and engaging in downstream functions such as marketing.[87]

Initially, this allowed leading buyers like Nike, Apple, or Wal-Mart to 'benefit from growing profits brought on by economies of scale and integration,' since they were able to rely on a small number of oligopolistic suppliers, each of which packaged more of the production process into longer-term and larger-volume contracts.[88] Though this would lead to a generally diminishing DMP for lead firms, it did not necessarily mean that the major brands and retailers were losing money. Instead, 'what emerges is an increasingly calcified *symbiosis* – locking-in global buyers with global suppliers – intensifying the integration of supplier-end capital; horizontally, as factories grow larger; and vertically, from factory to warehousing, logistics to retail.'[89] But this symbiosis weighs heavily on the firms lowest in the chain, since 'increased access to finance is reinvested into labour-saving technology, catalysing the erecting of insurmountable barriers to entry, which steel-reinforces the producers' market position.'[90] In other words, once a contract manufacturer oligopoly like Pou Chen (the owner of Yue Yuen) ascends to capture more than a fifth of global branded athletic footwear production, acting as the largest supplier for all the world's major athletic shoe brands, it becomes very hard for new firms to enter the industry at all.[91]

This does not, however, lead to any reduction in total output. In fact, the opposite is the case: economies of scale and investment in new technologies allow for Pou Chen and other expanding monopolies in the sector to pump out more shoes more easily, effectively exceeding the existing scale of the market. Firms funnel enormous amounts of fixed investment into extra machines, facilities, etc., all of which enable them to flood the market with extremely cheap goods on quick turnarounds. But, given that demand cannot respond with a similar elasticity to the increased output, this simply drives prices and profits further downward (at least among the actual manufacturers). This is why Bren-

87 Rigger 2021, pp. 99–107.
88 Kumar 2020, pp. 10–11.
89 Ibid.
90 Ibid.
91 Kumar 2020, p. 102.

ner refers to this phenomenon as a trend toward 'overproduction and overcapacity,' or even 'over-competition,' since, as a result, the emergence of these new monopolies intensifies competitive pressure within the sector and propagates it downward to suppliers, as the glutted market above drives firms to seek even cheaper inputs from firms below and drives even more expansive waves of acquisition. Because the pressure of the overseas contract manufacturers had already ruthlessly narrowed profit margins, the process of monopolisation was even more rapid among mainland companies. Only those that could grow quickly were able to secure contracts of sufficient size to survive through the next season.

The general pattern is easily illustrated in a series of simple plots. First, dividing the total value-added of industry by the total number of industrial enterprises in mainland China gives a measure showing the average scale of output per firm.[92] When we plot this by year, as in Figure 12, we can see that the ratio has undergone a more or less continuous increase, indicating that firms have, on average, become larger over time.[93] Second, the problem of overcapacity is illustrated when instead of output we plot the total number of industrial enterprises in China against their net profits, as in Figure 13. Here, we see a general trend over the course of the 2000s that is upward and linear, with the number of enterprises and their net profits increasing in line year by year, signalling that the steady growth of firms posed no constraint on profits. This was the height of the export boom, when many small, labour-intensive workshops crowded the supply-side of the market and there was still substantial room for capacity to expand. The pattern initially continues in the 2010s. But by 2013 or so it clearly hits a limit. While net profits advance somewhat (albeit incrementally and chaotically) over the remaining years, the total number of industrial enterprises is essentially stagnant. In other words, the smaller increases in total profits accrue to fewer firms, while overcapacity and consolidation press down overall profit growth. The stagnation in profits is even more evident when the total profits of all industrial enterprises are plotted, as in Figure 14.

92 Technically, the National Bureau of Statistics only counts 'industrial enterprises above a designated size' (规模以上工业企业). Before 1998, the NBS counted all industrial firms. Between 1998 and 2011, it counted firms with revenue (from their main business) of five million RMB or higher. From 2011 onward, it changed the cut-off to 20 million RMB. For most variables in its Industry series the changes are minimal, since firms above the designated size hold the vast bulk of all assets, take in the majority of all revenues, and produce most national output. The change does, however, impact the simple count of total firms, creating an artificial reduction between 2010 and 2011. For more detail, see: Holz 2013.

93 This is visible despite statistical redefinitions in 1998 and 2011 disjointing the dataset and inflating the number in the years after each redefinition.

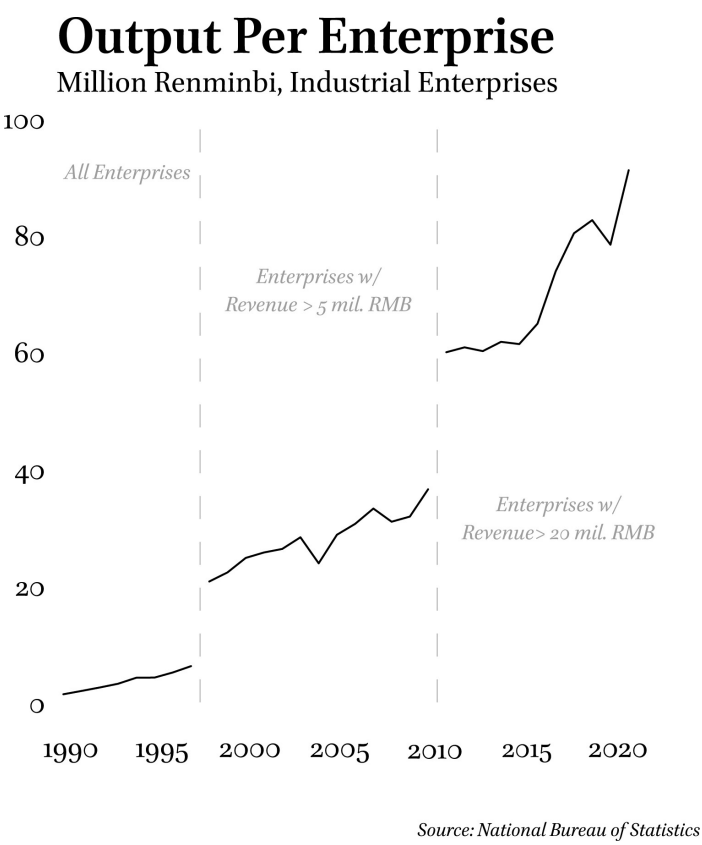

FIGURE 12 Output per enterprise: million RMB, industrial enterprises in China

Consolidation has therefore occurred not just among the subcontractors supplying final goods, but also those supplying key components. For example, though Foxconn has grown into the world's largest contract manufacturer and acts as Apple's single largest supplier, it does not produce all key inputs in-house, instead purchasing these components from other subcontractors. But, since Foxconn is so large – it is the biggest private employer in mainland China – firms supplying it with necessary inputs like camera modules or touchscreens find themselves in a similar condition relative to Foxconn as Foxconn occupies relative to Apple, stimulating an identical process of race-to-the-bottom consolidation that weeds out the smallest firms and encourages the growth of larger subsidiaries. Monopolies are thus forged within monopolies, all blooming like diamonds under the unrelenting pressure of the great global brands. In each instance, earlier-developing blocs find themselves forced into competitive symbiosis with later-developing ones, driving new waves of geo-

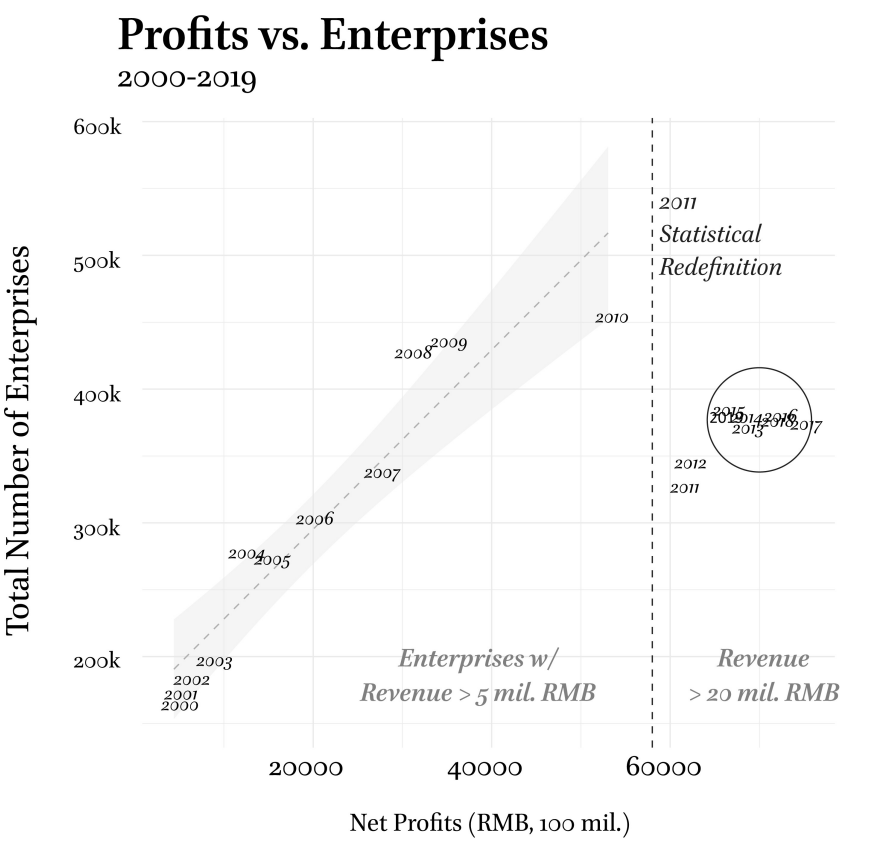

FIGURE 13 Profits vs. enterprises, 2000–19

graphic industrialisation. Subsequent relocations then alter these coordinates in contradictory ways, inducing both more ruthless competition and further consolidation at different links in the chain.

The monopsony power of US firm Apple, which owns the IP and specialises in design and marketing, helps to cultivate the monopoly power of Taiwanese suppliers such as Foxconn, Wistron, and Pegatron, specialising in final assembly, which then provides the conditions necessary for the emergence of mainland Chinese monopolies such as Lens Technology, specialising in cover glass and touch sensor modules, AAC Technologies, specialising in miniaturised acoustic components, and Luxshare Precision Industry, specialising in connectors and wireless charging technology. The same basic pattern is visible even in more vertically integrated chains, such as that of Samsung, with clusters of smaller-order suppliers taking shape around its smartphone facilities in

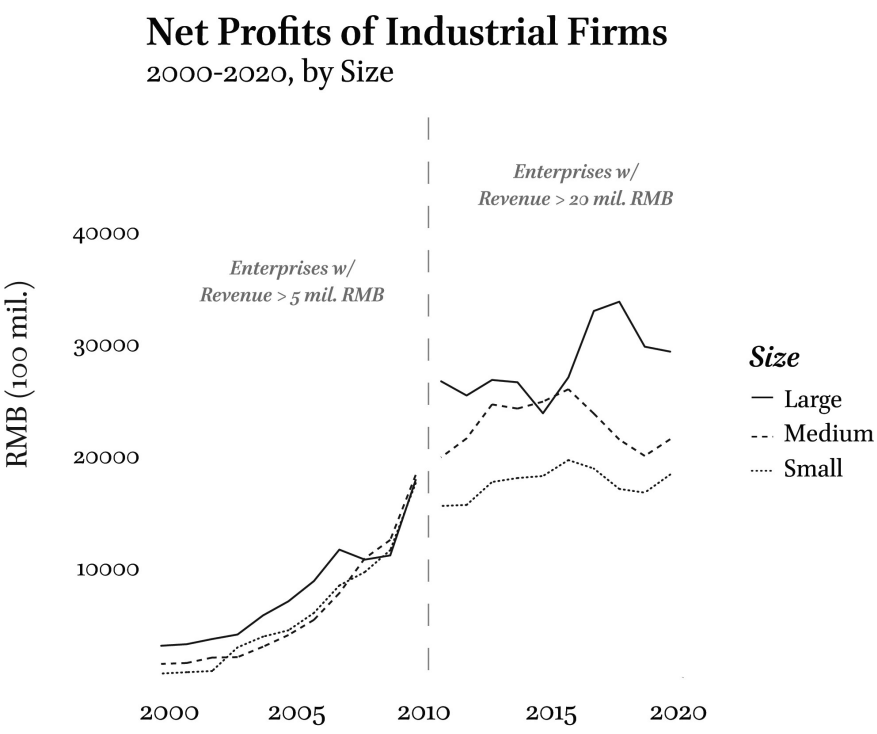

FIGURE 14 Net profits of Chinese industrial firms by size, 2000–20

the Pearl River Delta and Tianjin. As costs rise in China, these higher-order Taiwanese and South Korean monopolies then lead relocations to new productive complexes in places like Vietnam and India at the behest of the global brands, often selling off their older facilities in mainland China to local firms. Samsung shuttered all of its smartphone plants in China in the late 2010s and opened one of the world's largest smartphone factories in Noida, India shortly thereafter. But Samsung retained its higher-end facilities in China, such as its NAND factory in Xian and its R&D centre in Tianjin, and had already cultivated an entire ecosystem of white label producers in China capable of supplying it with cheaper phones for its budget lines. Now, even as major monopolies like Foxconn and Samsung open their own plants in cheaper markets, rapid growth and lower sunk costs among these mainland contract manufacturers allows them to enter the same overseas markets just as quickly, carrying their vicious symbiosis into a new locale where it will then spawn even more competition from up-and-coming firms.

Many of the sharpest conflicts between companies therefore emerge at the borders separating these nested oligopolies. Once the initial field has been culled of competitors, victorious monopolies quickly find their space for lateral development limited by overall market demand. To appropriate a greater share of total profits, such firms must mobilise their expanded access to financing to pursue both organisational and technological fixes. Organisationally, this involves greater centralisation – visible for example in the consolidation of production into larger complexes, the streamlining of factory-level management, and the higher-level restructuring of corporate organisation – and the absorption of more subsidiary or auxiliary functions into the core firm. For example, Kumar notes how Yue Yuen's development was guided by the 'ambition to bring all phases of production – from conception to distribution – under the Yue Yuen label,' ultimately allowing the firm 'to market itself as a one-stop shop, 'full package' to global buyers, handling raw materials, assembly, design, and distribution of products.'[94]

Technologically, firms retain their position against competitors and further refine profits by funnelling money into R&D, acquiring subsidiaries that can produce higher-tech inputs in-house, and mechanising and automating as much production as possible. The conflicts that emerge from the process often evolve into classic trade war claims of industrial espionage and trade in corporate secrets, as in a case brought to court in Taipei in 2022, where Taiwanese contract manufacturer Catcher Technology sued mainland China's Luxshare Precision for poaching the employees at Catcher's mainland-based R&D facility in an attempt to accelerate the mainland firm's entry into the supply chain for iPhone and iPad shells, at the time dominated by the Taiwanese company. In May of that same year, Taiwanese authorities also launched raids on ten mainland Chinese companies (and affiliated R&D centres) operating in Taiwan 'without approval' and 'suspected of illegally poaching chip engineers and other tech talents.'[95] Similar claims have been made by Samsung, with former executive Choi Jinseong repeatedly detained by South Korean courts and accused of leaking industrial secrets to Chinese firms that he is invested in.[96]

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94 Kumar 2020, p. 103.

95 Blanchard, Ben 15 July 2022 'Taiwan accuses Chinese Apple supplier of stealing secrets, charges 14', *Reuters*. https://www.reuters.com/technology/taiwan-accuses-chinese-apple-supplier-stealing-secrets-charges-14-2022-07-15/

96 Park, Ju-min 05 September 2024 'South Korean chip executive detained again over alleged technology leak to China', *Reuters*. https://www.reuters.com/technology/south-korean-chip-executive-detained-again-over-alleged-technology-leak-china-2024-09-06/

Though often aggressive, the process itself is gradual, and one in which the loss of crucial orders placed by the major monopsonies can annihilate incremental gains seemingly overnight, as when mainland miniaturised acoustics equipment supplier Goertek saw its revenue and profits drop drastically after Apple shifted seven orders to mainland competitor Luxshare in an attempt to diversify its supply, thereby reducing Goertek's total Apple orders by 70 percent.[97] Advances are therefore piecemeal and often stuttering. At the organisational level, progress is made through mergers and acquisitions, restructuring of corporate governance – firms usually establish a mainland-based holding company and then launch lucrative IPOs via specialised subsidiaries to secure additional financing on both domestic and global capital markets – and greenfield investments in new plant and equipment. Often, all three occur at once, as when a mainland firm seeks to acquire a more advanced supplier or competitor in an overseas market. In order to make such an acquisition, the firm frequently creates a local subsidiary in the target market capable of conducting the deal and managing the acquisition, often also requiring that it already have an international parent company, usually listed on major global stock exchanges (usually either Hong Kong or New York) since IPOs on these markets give it access to necessary financing for such deals. Then, after the acquisition is pushed through, the parent company both expands production at the new acquisition within the host market while also making use of the various patented technologies it acquired to roll out new production lines in its own home market. This pattern can be seen in the acquisition of US-based General Electric Appliances by Qingdao firm Haier, for example, with Haier using its newly-acquired US factories and warehouses to enter the lucrative US market while also gaining access to more refined IP and hands-on experience in more advanced product lines, which has helped the firm upgrade its facilities in China.

This process thereby overlaps with the continuous implementation of technological fixes. Nonetheless, investment in new plant and equipment is a necessarily slow and, at the highest levels, getting new plants and up and running may take as much as a decade. Sociologist Xu Hui, who has conducted extensive field research on technological upgrading within Chinese supply chain companies, offers Foxconn's three-stage technological strategy as a representative example:

97 Xu 2025 (forthcoming).

> the first stage consists of workstation automation by using industrial robots to do the dirty, dangerous, and dull work which workers are not willing to do or which will jeopardise workers' physical and mental health; the second stage is the automation of the assembly line by employing not only industrial robots but also other non-standardised automated equipment; the third stage is the automation of an entire workshop, achieving flexible production in assembling, logistics, testing, and packaging.[98]

But this is only a blueprint. In reality, 'most enterprises are still in the first stage of workstation automation' and 'there is rarely an entire assembly line robotised.'[99]

Only the largest-scale enterprises like Foxconn have been able to automate entire assembly lines, while the automation of full workshops remains extremely limited. Nonetheless, the impact is clearly visible: 'By 2018 [Foxconn] was deploying more than 80,000 units of industrial robots in its factories across the country' with the process most lucrative in the locations where labour was already most expensive. For example, 'in one of its workshops in Shenzhen the number of assemblers had declined from 318 to 38, while the production efficiency had increased by 30 percent with the inventory cycle time contracting by 15 percent.'[100] In other words, the company was able to produce far more goods per unit of labour through an intensive investment in fixed capital. Meanwhile, it was also able to profit from the production of the robots themselves, with production bases (in Shenzhen and Jincheng) capable of producing '10,000 industrial robots per year,' whereas smaller firms were forced to rely on 'robotic system integrators' that act as contract manufacturers of automated assembly lines, installing machines, providing training, and later holding the license to conduct repairs.[101] One technological fix (in assembly) was therefore chained with another (in robot production), allowing the company to make further advances into higher-tech and higher-value product lines.

Altogether, fixed investment in industrial robots and the emergence of both factories specialising in robot production and firms specialising in auxiliary functions like installation and repair have contributed to the more general transformation of the territorial industrial complex in Shenzhen. Not only is

98 Xu 2020.
99 Ibid.
100 Ibid.
101 Ibid.

the city at the forefront of the national drive toward automation, but it also hosts the headquarters of many of the emerging tech monopolies, including lower-level OEM or ODM firms such as Luxshare and AAC Technologies and a handful of higher-end domestic brand names like Huawei and ZTE. Many of these firms operate higher-tech factories and R&D centres in the coastal cities while also funding expansions in inland China and overseas. For example, in addition to its facilities in the Pearl and Yangtze River Deltas, Luxshare has factories in Guangdong's interior, in Jiangxi, Hebei, Shanxi, Sichuan, and in Bắc Giang, Vietnam.[102] Nonetheless, even the most cutting edge of these coastal territories are still late-developers relative to the industrial blocs of the higher income countries. This is evident in the fact that the most advanced and competitive Chinese manufacturers such as Lenovo or Huawei continue to depend on higher-tech inputs such as microchips that can only be provided (at least for now) by firms in wealthier countries. Many of the most direct competitors in this regard are, again, South Korean and Taiwanese firms, but the entire chain is dependent on IP from firms headquartered in the wealthiest countries, such as Arm, Apple, and Intel. Thus, aggressive tariffs and national security interventions on the part of the US and UK have provided crucial assistance in blocking Chinese companies from climbing further up the value chain. Chinese supply chain firms thereby find themselves 'hemmed in by the moat of insufficient technology, fierce competition and low profit margins … unable to cross the threshold into higher realms of production.'[103]

7 Overcapacity

In Brenner's account of competition between earlier- and later-developing industrial blocs, periodic crises are key punctuations in the process, clearing out obsolete stock in the earlier-developing regions, driving consolidation among the surviving firms, and solidifying nascent changes in the geography of production. At the same time, since they enable the emergence of new competitors (and therefore set the stage for developmental booms in emerging territories), such crises ultimately worsen overcapacity across the industry as a whole and induce further stagnation. But not all crises are the same. In fact, Brenner's account hinges on the fact that periodic busts are regularly and effectively prevented from spiralling into devastating depressions that force mass bank-

102 Luxshare 2022 'About Us', *Luxshare ICT*. https://en.luxshare-ict.com/about/intr.html
103 Xu 2023.

ruptcies. Soon after the crisis begins, fiscal and financial measures are deployed to bail out the most threatened sectors and pump up the rate of investment. Although such interventions offer an effective short-term fix, over the long run they will tend to produce diminishing returns per unit of new investment and drive up economywide debt, inflating new bubble sectors whose continuing viability hinges on cheap credit, rising real estate values, targeted subsidies, or repeated financial injections by monetary authorities.

This then produces sluggish, top-heavy national economies in which lower-order vitality – visible in things like the quality and quantity of employment or the proliferation of smaller-scale enterprises – are sacrificed even while higher-order measures break all records. Stock values skyrocket, real estate prices inflate, and billionaires rake in unprecedented year-on-year gains in wealth, with the entire system facilitated by increasingly overt forms of political patronage.[104] And yet policymakers are faced with an impossible choice, given that stimulus measures are, in fact, able to prevent these smaller crises from cascading into a catastrophic collapse of the global market, such as that seen in the Great Depression of the 1930s. But even the best forms of macroeconomic management cannot prevent crisis as such. Instead, these interventions produce partial crises that appear in the form of financial crashes followed by recessions, with each 'recovery' more muted than the last. Moreover, precisely because the crisis is stopped short of wiping out obsolete producers and clearing excess capacity, the crisis itself stretches out in time. The result is something more akin to the 'Long Depression' of the latter nineteenth century, marked by slow growth, low profits, and persistent industrial price deflation but also accompanied by expanded production, rising trade, intensified competition, and the bolstering of ruling class power – evident in both the spectacular rise of new robber barons and in their barely-hidden influence over state institutions.[105]

Brenner therefore refers to a 'Long Downturn' beginning in the 1970s. From this point onward, regular booms and busts centred on particular regions occur within (and as a manifestation of) more general stagnation in growth rates, rising overcapacity and overproduction, and increasingly zero-sum competitive conditions in the global economy as a whole.[106] Within such an environ-

104 Brenner and Riley 2022.

105 This does, not, however, mean that our current period of long-run stagnation mirrors the Long Depression in all of its details. For a comparison of the Long Depression of the nineteenth century to the 'Long Downturn' of the twentieth century as theorised by Brenner, see: Arrighi 2003, pp. 5–71.

106 Brenner 2006.

ment, interventions that successfully stimulate new growth in private investment tend to simply result in more firms proliferating within the same product lines, intensifying competition (not only despite but *due to* the emergence of new monopolies), narrowing profits, and ultimately leading to more bankruptcy, greater consolidation, and renewed demands for special protections and direct fiscal injections from the state. In such conditions, larger and larger shares of new investment will come in the form of additional housing, infrastructure, and other real estate assets that tend to inflate in price alongside localised growth booms. Both the initial industrial boom and the flood of investment into related assets will then create bubbles that, in retrospect, take on a 'financial' and 'speculative' character. But finance is simply a technology used to coordinate production and deploy class power, no more or less speculative than any other sector. It is ultimately the growing overcapacity in manufactures and declining profitability in the core of the productive complex that then induces further financial and fiscal stimulus. When these interventions produce diminishing returns, this generates the illusion of an unproductive financial machinery weighing down the 'real economy' beneath. In fact, the problem is exactly the opposite: the excess capacity and narrowed profits of industry make it an increasingly unproductive strain on the total social capital deployed by the well-oiled machinery of finance.

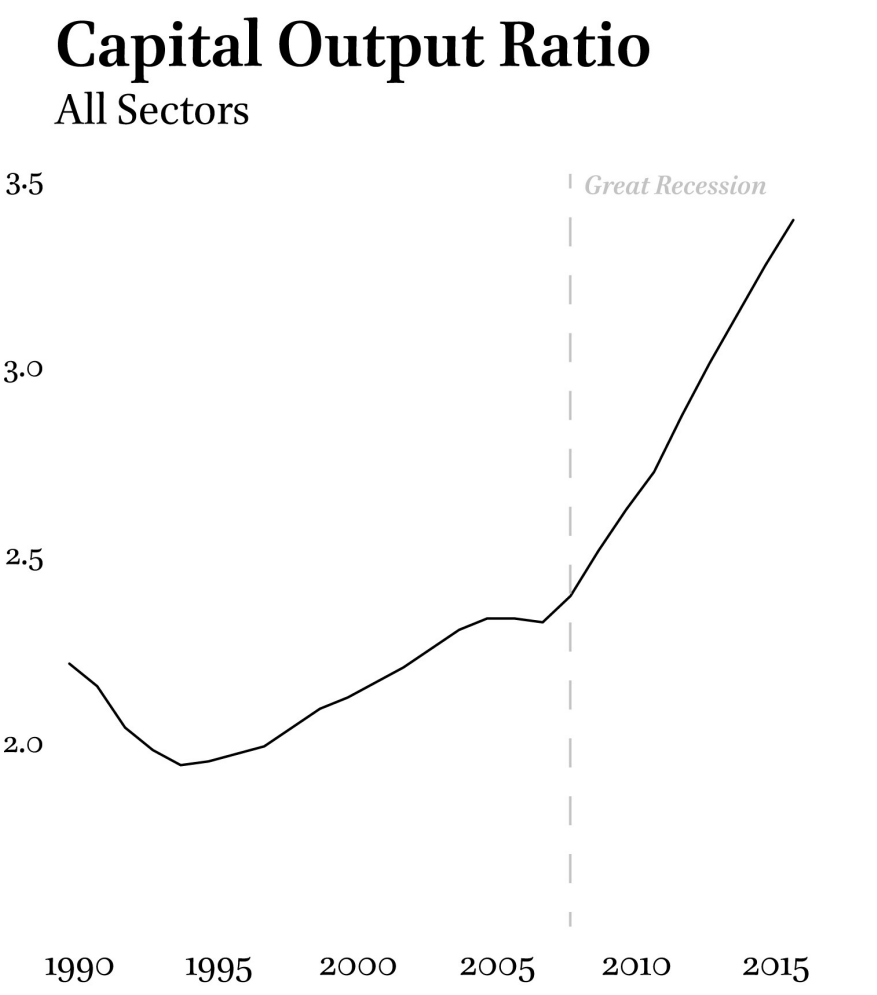
If we were to summarise the entire process: the profitability of an increasingly monopolised and 'overcompetitive' manufacturing sector declines after a rapid boom, with the built-up stock of fixed capital gradually depreciating in place. Despite growing financial activity and continual injections of new debt, the pace of accumulation stalls, leading to a period defined by slowing and then stagnant growth rates, the deindustrialisation of employment, and the emergence of repeated bubbles. Each cycle then induces a ratchet effect, worsening the underlying problems of stagnation and overcapacity. The pattern might be compared to a funhouse staircase you might find in some roadside carnival, where the gimmick is that each step grows broader and shorter the higher you go, such that the further you climb the less you progress. Or perhaps it is something darker: one of those heartland Halloween horror fairs built up in the real ruins of rotting farmhouses and grain silos left behind by some half-forgotten agrarian crisis half a century prior. The strobe lights flash on fake blood spattered over real mildew as canned screams play in the distance and mannequins with Slipknot masks pop out in automated jumpscares. As you make your way down the creaky stairs of some Depression-era ruin you can hear the stirring of a distant monstrosity beneath your feet. Claws scratch at the rotted wood. Its hide scrapes against the cold dirt of the cellar. And the sound gets closer as you move slower and slower in your descent down the rotting

staircase, maybe taking on a hint of rusted, clinking metal. Eventually, the footing gives way entirely and you fall into it: the doom loop, the hyper-crash, the never-quite-final crisis – or simply the blacked-out ballpit below the gimmick, filled with cigarette butts flicked by the carnies behind the curtain, armies of them, you realise, who have always been here moving through the bowels of the haunted house like maggots dancing blind and hungry through the rot that lies at the base of the world.

In China, the basic pattern can be tracked by measurements of the capital stock, which grew steadily against total output from the mid-1990s onward, then more rapidly in the years after the Great Recession (see Figure 15).[107] In general, the ratio of capital to output captures 'how much capital spending is required to buy an additional unit of GDP growth.'[108] The rising ratio visible over the 2010s therefore indicates that returns on each unit of investment began to diminish much more rapidly after the crisis and ensuing stimulus. This makes sense, given that the bidding wars between localities took place in two stages: first, competition over stimulus loans used to finance the build-out of infrastructure, leading to an increase in the capital stock but not an increase in output; and second, competition for inbound industrial investment, leading to an increase in output that would allow the initial debt-financing of fixed infrastructure to be paid off. While some localities succeeded in both contests, the rapid increase in the capital-output ratio across the entire national economy indicates that, on average, the loans used to build out fixed assets did not produce a commensurate increase in output. Again: these were massive business parks complete with roads, utility hookups, and entire fully functioning factory, warehousing, and dormitory buildings, waiting to be filled with the machinery and other necessary equipment that formed the bulk of the industrial firms'

107 The methods used by the National Bureau of Statistics (NBS) for measuring gross fixed capital formation differ from the international standard. Initially, the NBS measure of total investment in fixed assets in the whole country (全社会固定资产投资) had included not only the cost of purchased land, existing buildings and second-hand equipment, but also counted these as new additions to the fixed capital stock whenever a merger occurred despite the fact that this was merely pre-existing fixed capital changing hands. This falsely inflates the NBS measure until around 2015, at which point the NBS modified its methodology to bring it more in line with international standards (see Lardy 2019, p. 20, footnote 12). Here, I use the NBS sources only when they are not impacted by this distortion, as when comparing the sectoral share of total fixed capital investment (since there is no evidence that the definitional change unduly impacted one sector over the others). Elsewhere, I use what I consider to be the most robust and detailed estimate of the Capital Stock in China, which unfortunately only extends to 2016, from Herd 2020.

108 Orlik 2020, p. 181.

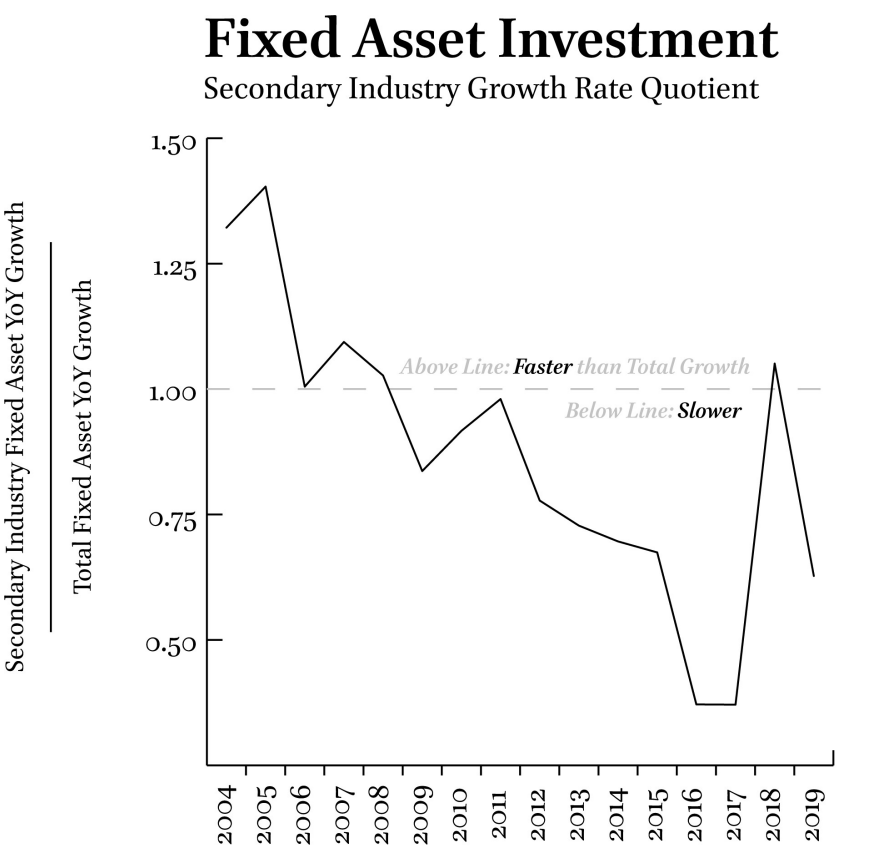


Source: Herd 2020

FIGURE 15 Capital output ratio, China, all sectors

prospective investment. By the middle of the 2010s, it became clear that a large portion of these facilities were sitting empty or were only partially occupied.

This is even more evident once the components of the capital stock are decomposed. For example, if we look at the 'growth rate quotient,' which compares the annual growth of investment in fixed assets in industry alone to the annual growth of investment in total fixed assets as a whole, we see that the industrial capital stock was growing slightly faster than the overall capital stock throughout the 2000s, but the pattern inverts in 2009, after which



Source: National Bureau of Statistics

FIGURE 16 Fixed asset investment, China, secondary industry growth rate quotient

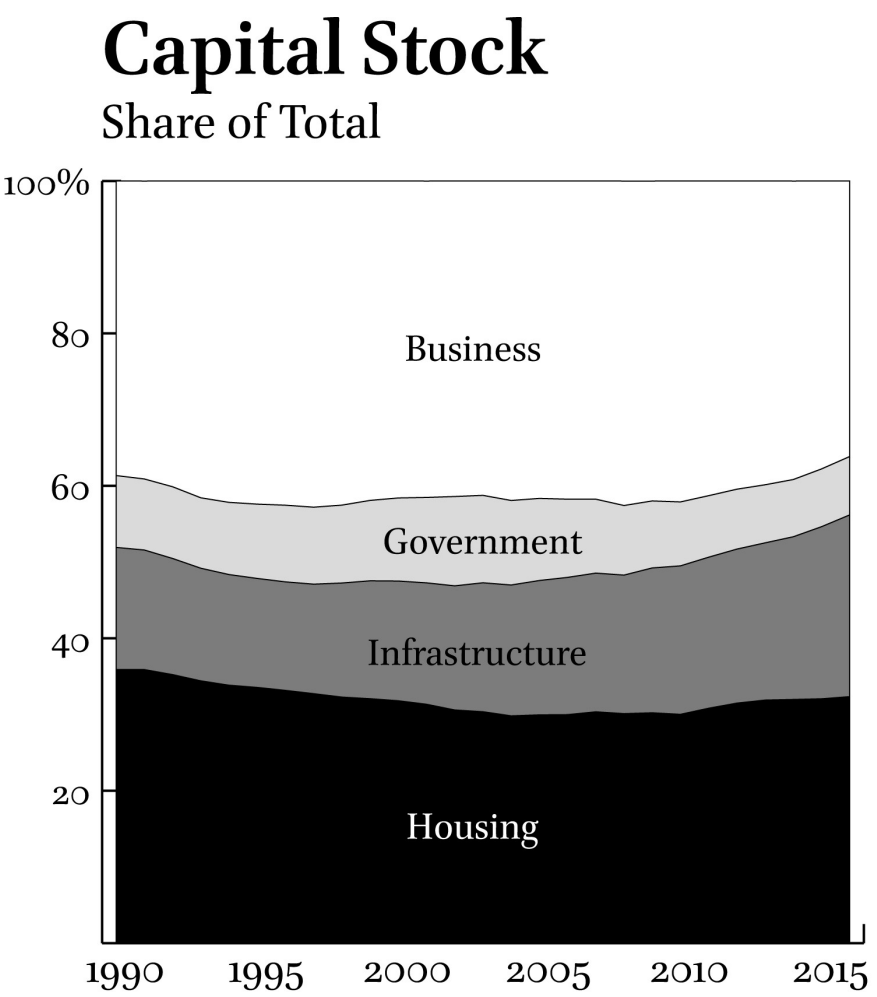
industry's growth rate declines substantially relative to overall growth in fixed asset investment, with 2018 the sole and slight exception (Figure 16).[109] The quotient helps to illustrate whether industry or sectors like real estate and infrastructure are driving growth in the built environment. Values above 1 indicate

109 The series presented here exclude the years 2020 and 2021 because the outbreak of the global pandemic causes a wobble in the data, with the expansion of industrial capital stock all but frozen in 2020 (a mere .1 percent growth over 2019, some 27 times smaller than the growth in the total stock that year) even while housing and infrastructure stock continues to grow (albeit more slowly). The industrial stock then catches up in the following year, which sees unusually rapid growth (11.3 percent, over twice as rapid as the growth in the total capital stock).

that the growth of industrial fixed capital was greater than general growth in fixed capital. For example, a value of 1.5 means that industrial fixed capital growth was one-and-a-half-times that of general growth in fixed capital in the same year. Values below 1 indicate the opposite, signifying that the growth of non-industrial fixed capital was greater than the growth in industrial fixed capital, meaning that a value of .5 indicates industrial fixed capital grew at half the rate of growth in fixed capital in general. This mirrors a more general pattern visible when the relative shares of the capital stock committed to business, infrastructure, housing, and government are displayed separately (Figure 17). The 2010s saw a narrowing in the share of the capital stock owned by businesses (which includes things like investment in factory machinery), which peaked in 2010 at 42.6 percent then declined to 36.2 percent by 2016. The loss was matched by a moderate gain in the stock devoted to housing (30 percent to 32 percent over the same period), a continuation of the long decline in the capital stock owned directly by the government, and a notable rise in the stock devoted to infrastructure (from 18 percent to just under 24 percent).

Having successfully attracted land-financed loans to build out business parks and high-rise complexes, the average locality then found itself unable to secure sufficient flows of subsequent investment in productive industries. In response, many had no choice but to double down, pouring even more money into real estate and infrastructure, either in the hope that this would finally attract self-sustaining industries or simply expecting that the assets could be sold off at a higher price at a later date. The same basic pattern was also visible within firms themselves, which were able to win cheap loans but found greater returns in speculative asset purchases rather than in successfully expanding production. In fact, through this process, many of the local government financial vehicles (LGFVs) created to facilitate the land financing system grew into increasingly diversified developmental conglomerates in their own right, often with substantial interests in ensuring that real estate values remained high. In many locales, LGFVs served as anchor firms both driving more general growth and absorbing much of the accrued debt. But it would be a mistake to think of LGFVs as purely speculative. They are ultimately 'asset-backed structures with revenue-generating or liquidatable assets to service and support the debt.' And the fundamental issue is therefore 'whether the assets are productive enough to offset their cost, which can be represented by their debt and liabilities.'[110]

110 Luk, Glenn 21 June 2023a 'Project Finance with Kweichow Characteristics', *reading, writing & investing*, Substack. https://readwriteinvest.substack.com/p/project-finance-with-kweichow-characteristics



Source: Herd 2020

FIGURE 17 Capital stock, China, share of total

Determining this is, however, complicated by the fact that LGFVs are hybrid state-private institutions that often specialise in infrastructural and poverty-eradication efforts with inherently low returns.

Very loosely, by the end of the 2010s, LGFVs could be classified into five categories: First, the 'Infrastructure LGFV,' specialised in construction of roads, railways, utilities, etc. Second, the 'Real Estate Asset Management LGFV,' specialised in the development of residential space and business parks, many of

which are kept 'on the balance sheet' to inflate the valuation of the firm. These are the two forms of LGFV most commonly reported on in the media, treated as either a developmental vehicle (in the first case) or as a dangerous symptom of the housing bubble (in the second). Third is the 'Structured Asset-Backed Warehousing LGFV,' which is similar to the former two but acts only as a temporary holding company for these assets, essentially operating like a financial firm that buys and sells collateralised debt obligations. These LGFVs often partner with larger development conglomerates such as Evergrande to ensure a rapid turnover of their asset portfolios, keeping them mostly 'off the balance sheet.' Fourth is the 'Financial Intermediary and Investment Holding LGFV,' which specialises in inter-company lending, often to other LGFVs. These can be thought of as a sort of internal banking system inset within the land-finance market itself. And, finally, there is the 'Conglomerate "All-of-the-Above" LGFV,' which operates in all these dimensions simultaneously and often also owns productive subsidiaries or has shares in private companies that operate in the very business parks that it manages (and is therefore similar in many respects to precedents such as the Korean *chaebol*).[111]

Realising the problem of rising local debt, central authorities sought to gradually tighten credit controls and anti-corruption measures, attempting to tamp down speculation without triggering a catastrophic crash. While the goal was to deflate the bubble slowly, the result was simply a plateau in total debt: 'from 2008 to 2016 China's debt-to-GDP ratio rose from 142 percent to 250 percent. In 2017 and 2018, it levelled off, ending 2018 at 254 percent.'[112] Similarly, though the efforts had succeeded in pushing down the share of bad local government loans, this was done through a debt swap, not a debt write-off. Loans obtained at short-term market rates were systematically refinanced through the issuance of five-year bonds, halving their interest rates and extending the repayment schedule to align it better with the expected horizon of returns for long-term infrastructural assets.[113] But the ability of new credit to stimulate growth was also diminished substantially over the same period, calling into question the feasibility of even these extended repayment plans: 'the additional GDP generated by each new 100 yuan of credit fell to 23 yuan in 2018, down from

111 This summary is drawn from: Luk, Glenn 27 June 2023b 'LGFVs: the Good, the Bad, and the Mierda, Part 1', *reading, writing & investing*, Substack. https://readwriteinvest.substack.com/p/lgfvs-part1; Luk, Glenn, 11 July 2023c 'LGFVs with Korean Characteristics', *reading, writing & investing*, Substack. https://readwriteinvest.substack.com/p/lgfvs-with-korean-characteristics

112 Orlik 2020, p. 134.

113 Orlik, pp. 128–33.

95 yuan in 2005.'[114] In other words, the 'multiplier' associated with this sort of stimulus had been cut down to less than a fourth of what it had been a little more than a decade prior.

Meanwhile, the size of the total debt had also begun to eat into growth rates that were already slowed by overcapacity, with 'close to 20 percent of GDP … used to service debt' by 2018, a figure 'higher than the United States on the eve of the financial crisis.'[115] In the end, almost no deleveraging had occurred by the close of the decade, with debt even ticking up slightly in 2019 and then leaping even higher in 2020 after the outbreak of the pandemic. Within the first few years of the 2020s, even optimistic appraisals put the overall debt-to-GDP ratio at somewhere between 260 percent and 270 percent, or some ten to fifteen percentage points higher than in 2018. Naturally, much of this debt has come to be concentrated in the LGFVs, with one IMF report finding 'that around 77% of LGFV debt (¥38 trillion) was with entities that did not generate sufficient earnings to cover interest expenses for three consecutive years.'[116] Altogether, LGFVs were estimated to be holding some 9.3 trillion USD of debt as of 2020. However, their assets (of roughly 20 trillion USD) were also more than sufficient to cover this debt. The question is therefore a more concrete issue of solvency and liquidity for individual LGFVs in the specific locales that have not seen productive industries follow from the infrastructural build-out.[117] But the trend has not been entirely confined to local governments or speculative sectors like real estate. The debt-to-output ratio for non-financial corporations rose from just over 95 percent at the end of 2008 to hover between 150 percent and 160 percent by the early 2020s, with many industrial firms dependent on annual injections of credit in order to fulfil their seasonal contracts.[118]

In practical terms, the diminishing returns on this growing debt has also meant that the urbanisation of the Chinese interior, though evident in the massive expansion of housing and infrastructure, has not been accompanied by a similar magnitude of industrialisation. Especially when compared to the rapid industrial growth of the original coastal production complexes, even the interior hubs in Henan or Chongqing where the growth in fixed asset investment has been the fastest (often over 30 percent per year in the decade between

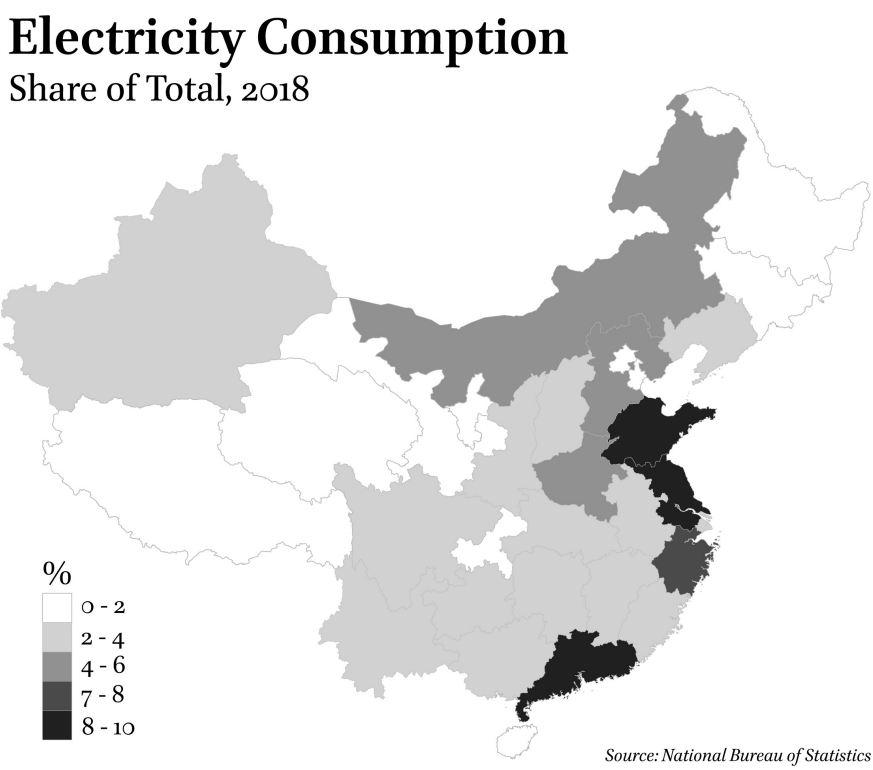
114 Orlik 2020, p. 181.

115 Ibid.

116 Luk, Glenn, 3 August 2023d 'LGFVs: The Path Forward', *reading, writing & investing*, Substack. https://readwriteinvest.substack.com/p/lgfvs-the-path-forward

117 Ibid.

118 Zhang and Liu 2021. Data for non-financial corporations are taken from the NFID's official measures of the debt-to-output ratio, available here: http://114.115.232.154:8080/.



MAP 8 Electricity consumption, share of total, 2018

2005 and 2015) have tended to see slower accompanying growth in gross output and total employment, with the trend even more pronounced for industry. It seems that the advancing mechanisation of production lines and greater corporate consolidation have entrenched investments in the original coastal hubs even as they stimulated the opening of new lines elsewhere. Overall, the pre-existing inequality between coast and interior has largely been maintained despite relocation, with very little change in provinces' shares of total electricity consumption, for example (see Map 8).

Meanwhile, the emergence of new manufacturer oligopolies has also weighed down the growth of new inland competitors. When disaggregated by firm size (as measured by total revenue), it becomes clear that profit growth has been most constrained among small- and medium-sized companies, while the largest firms saw their total profits increase over the second half of the decade (see Figure 14). But when rates of return are considered rather than total profits, the relationship is reversed. Since the largest firms also saw their assets growing over the same period, larger companies become less profitable than

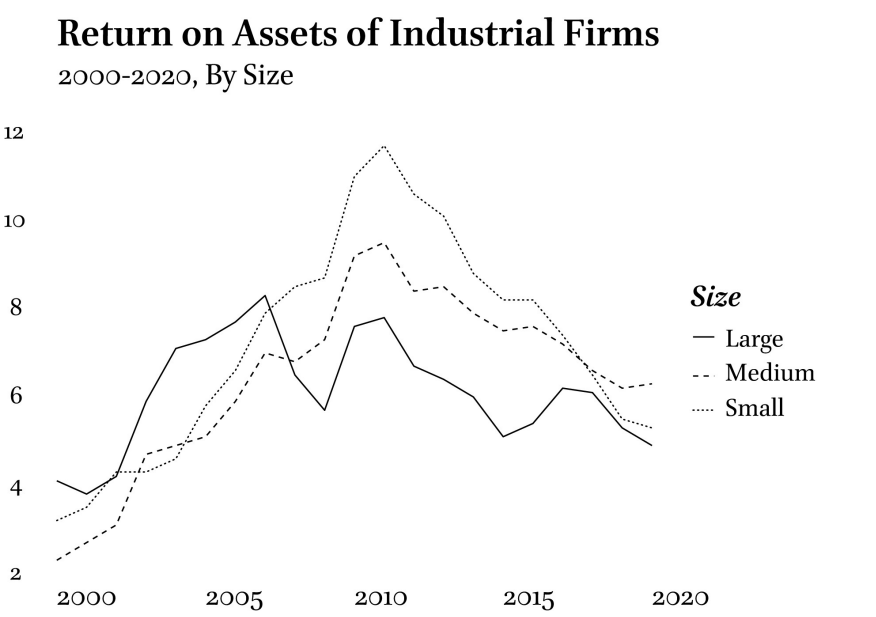


FIGURE 18 Rate of return on assets, 2003–20, industrial firms in China, by size

smaller, more labour-intensive ones after the outbreak of the crisis – at least until rapid declines in the profit rates of smaller firms sees the difference narrow by the end of the decade (Figure 18). Ultimately, there has been no boom in new SMEs in the inland provinces comparable to that which occurred in the first wave of export-led industrialisation in the coasts.

The same trend is visible at the national level, in which the plateau of net profits is accompanied by an across-the-board decline in profitability, as measured in the rate of return on assets (output or net profits divided by capital stock or total assets) or the profit rate (same as above but including the total wage bill in the denominator). Figure 19 shows the general trend in the rate of profit for all economic sectors and for industrial enterprises alone.[119] For the domestic economy as a whole, profitability was high throughout the

119 The former is calculated by averaging all measures of either the Rate of Return or the Rate of Profit in the existing academic literature in both English and Chinese and in existing statistical databases, including data from the NBS and from various iterations of the Penn World Tables. The latter is calculated using data on industrial enterprises recorded by the NBS. The details can be found in: Neel 2021, pp. 230–6.

1990s and 2000s, with a steady decline beginning in the years after the Great Recession. For industry specifically, profitability was low in the 1990s, rose rapidly in the 2000s at the height of the export boom, declined somewhat after the Great Recession, recovered in 2010 and 2011, and then fell for the remainder of the decade. Overall, the 2010s were defined by a more or less continual decline in profitability despite the debt-fuelled expansion of the capital stock. This decline in the profit rate then generated stagnation in the total mass of profits across industry throughout the early 2010s, followed by a slight increase in the total profits of large enterprises accompanied by a commensurate decline in total profits among medium and small enterprises (see Figure 6). But the basic point is simply that, however it is measured, industrial profits were constrained for more or less the entire decade, with no signs of recovery by the early 2020s. By 2025, years of overcapacity and ensuing price cuts for major goods had stoked increased fear of an imminent deflationary spiral.[120]

8 Beneath Eroding Exports

While many commentators argue that at least part of the decline in profitability is due to the rising influence of state-owned enterprises (SOEs) over the course of the 2010s, this is only partially accurate. There are two kernels of truth to the claim: first, since many low-return infrastructural investments were made via LGFVs, these assets often appear on the balance sheets of nominally state-owned entities. Second, a subset of smaller SOEs that were never subject to restructuring do still exist, and they tend to have low profitability and high levels of debt. Some new firms linked to the LGFV system have even begun to register themselves as older-style SOEs, causing the number to increase in official statistics. But this account falls short in other respects. While the profitability of firms with majority private investment does tend to be higher than in firms with majority state investment, that gap was sharpest at the beginning of the stimulus in the years right after the Great Recession. In the 2000s, the two

120 These narratives should, however, be taken with a grain of salt, as the exact cause-effect relationship between economic stagnation, deflation, and consumption rates remain hotly debated. Nonetheless, fears of a deflationary spiral are already visible in international bond markets, which have begun to turn increasingly pessimistic with regard to China's future growth prospects. As of 2025, yields on 10-year sovereign debt bonds for China had fallen to an all-time low. See: Pesek, William 10 January 2025, "China Downplays Deflation Troubles. Bond Vigilantes Aren't Buying It", *Barron's*. https://www.barrons.com/articles/china-deflation-bond-yields-xi-7a77705d

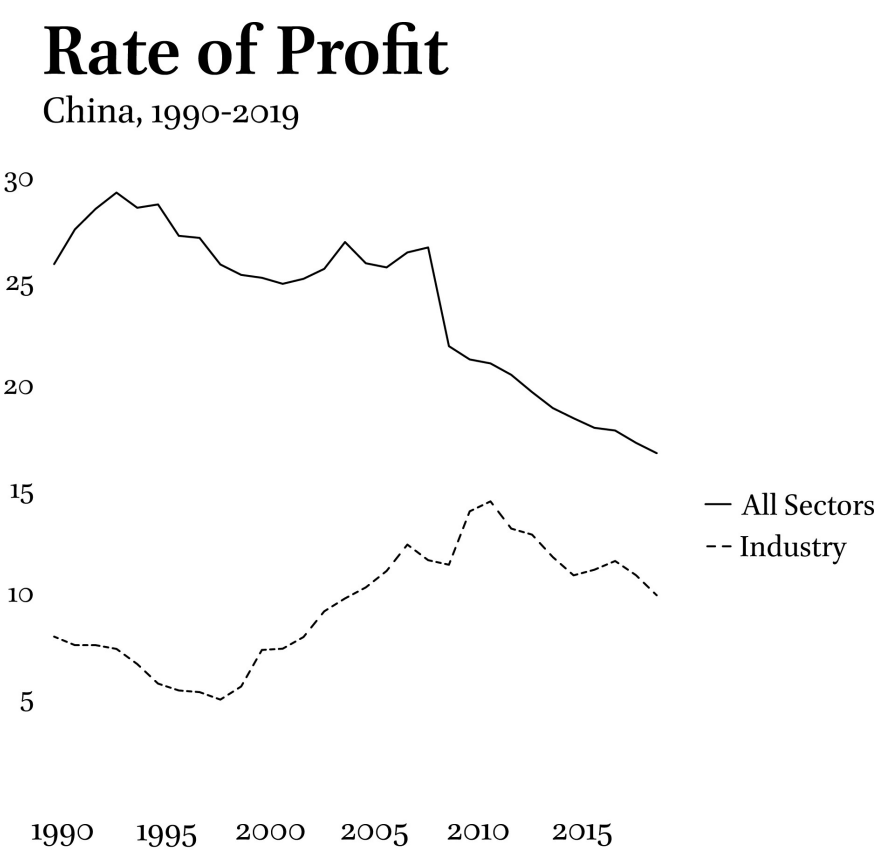
rates were extremely close to one another and moved in unison. Similarly, from 2012 onward, profitability has declined within both private and state-invested firms.

In fact, the decline has been much faster among firms that are majority private, bringing the profit rate of private firms more or less back in line with that seen in majority state-invested companies (see Figure 18). As former World Bank head Justin Yifu Lin argued in a speech given at the end of the 'Two Sessions' in 2024: 'the rising share and loan proportion of SOEs are consequences of the economic slowdown, not the cause. The reduced investment and loan shares of private enterprises result from external shocks and the overall economic slowdown.' This is because, while SOEs tend to operate in sectors that serve the domestic economy, the 'poor export environment will most significantly affect sectors that align with comparative advantages, predominantly private enterprises, suppressing their investment intentions.'[121] In other words, since the great trade collapse that followed the Great Recession was felt most strongly among private firms serving export demand, the supposed 'crowding-out' of private companies by SOEs is, in fact, simply the result of the nominally private sector being eroded by these rapid shifts in the trade winds. As small exporters went bankrupt or were swallowed up by larger contract manufacturer monopolies with larger portfolios of fixed assets and lower profit rates, this simply revealed the bedrock of infrastructural and financial investment beneath, which has always been (and is in every country) more closely linked to the state machinery.

But the narrative of inefficient SOEs pressing down profits is also wrong at a more fundamental level. With the partial exception of the small share of SOEs that were never subject to systematic reforms, it makes very little sense to treat 'state-owned' and 'private' companies as if they operate in qualitatively different fashion or as if they can even be clearly distinguished from one another in existing statistics. As will be explained in more detail in Chapter 5, many major SOEs are not listed as 'state-owned enterprises' in NBS data at all because they underwent a process of 'corporatization' around the turn of the century, after which they were then re-registered as LLCs or joint-stock companies.[122] It was

121 Lin 2024.

122 This is why NBS data includes information for 'Private LLCs' and 'All LLCs', with the latter the larger umbrella category. The official statistical category for 'State-owned industrial enterprises' (国有工业企业) therefore mostly accounts for the much smaller number of unreformed SOEs left behind after corporatisation, though the number has increased slightly in recent years due to more recent administrative changes. Nonetheless, only a few more than 3,000 firms were registered as SOEs in this category in 2022. At its lowest

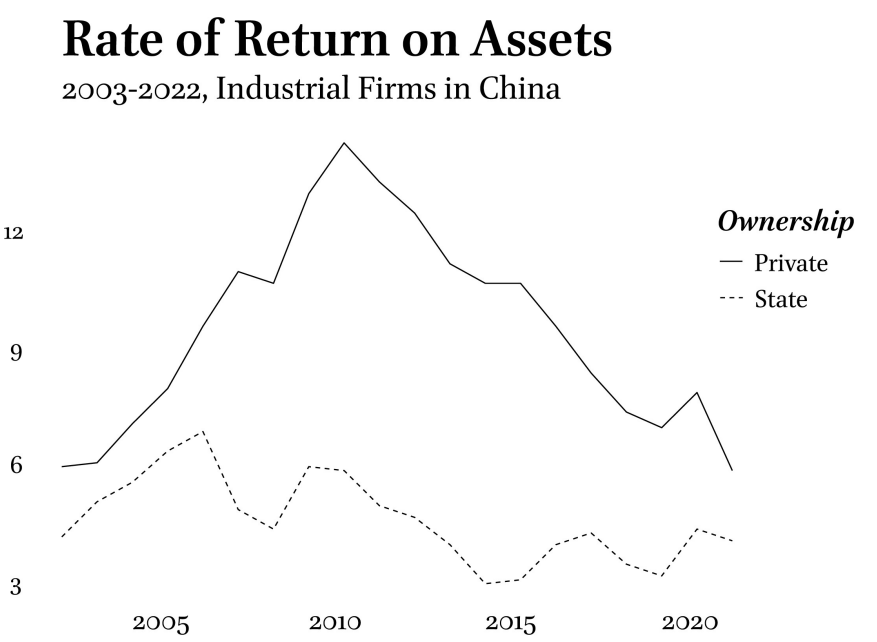


Source: Author's Calculations

FIGURE 19 Rate of profit, China, 1990–2019

at this point that all of the largest of today's nominally state-owned companies were brought into accord with international corporate standards and made to

point, in 2018, the category accounted for only 1,500 or so companies. The better measure in NBS data (used in Figure 20) is the categorisation of state vs. private firms by majority investment, rather than registration status. In NBS data, the variables for state-controlled shareholding industrial enterprises (国有控股工业企业) and private industrial enterprises (私营工业企业) capture this data. Here, the universe of firms is substantially larger, with some 27,000 state-controlled companies and some 49,000 private-controlled companies in 2022. However, even these categories merit caution, given that they only capture a small slice of all companies. For reference, in that same year, NBS data recorded some 349,269 firms registered as private industrial enterprises, out of a total of 472,009 firms with revenues above 20 million RMB.



Source: National Bureau of Statistics

FIGURE 20 Rate of return on assets, 2000–22, industrial firms in China, by ownership

operate as fully for-profit companies with the same basic balance sheet calculus and shareholder responsibility as any other firm. Meanwhile, state investment takes a wide range of forms and is often linked to different institutional entities that often have somewhat divergent interests. Smaller shares of state investment are also common in private companies and all firms above a certain size often have official party committees (which have no actual managerial influence on decisions made at the firm, though they sometimes help to network with state institutions). Ultimately, though, even firms that are unambiguously owned and managed directly by the central state tend to operate in every major respect like any other for-profit company and the government enforces state mandates through policy rather than through its shareholding power.[123]

In fact, 'due to China's institutional environment, large, successful firms – regardless of ownership – exhibit substantial similarities in areas commonly thought to distinguish SOEs from POEs [private-owned-enterprises] ...'[124] Many of the supposed divergences in profitability between the state and private

123 Milhaupt and Zheng 2015.
124 Ibid.

sector therefore seem to merely be proxies for other variables. For example, since profitability in infrastructure and heavy industry is lower, given higher capital-intensity and long investment horizons, and since these are also the sectors that tend to attract the most state investment, we would therefore expect majority state-invested companies to have a lower overall profitability than majority private-invested companies simply due to the composition of both groups. Within the Chinese steel sector, profitability is low across the board, not just among SOEs. It is therefore disingenuous to note that China Baowu Steel Group, the largest state-owned steelmaker (and one of the largest SOEs in the country) had an extremely low return on assets of just 1.4 percent in 2022 without also pointing out that China's largest private steelmaker Jiangsu Shagang Group saw an even lower rate of return (a mere 1.1 percent) in that same year.[125] Similarly, even major private conglomerates have very close ties to the state and often receive substantial amounts of either direct state investment or indirect subsidisation. At best, we can say that there exists a spectrum defined by degrees of direct state shareholding and preferential access to liquidity.

Again, the more salient feature here is the overall decline in profitability and stagnation in net profits, driven at least in part by increased automation and corporate consolidation. The overall pattern visible in the data is not at all unique to China but is instead very familiar, hewing closely to that documented by Brenner in all the major industrial countries from the 1970s to the present. In fact, the conditions Brenner identifies among US manufacturers in the late 1960s and early 1970s seems to presage the immediate future of many industrial enterprises in China today. Faced with declining rates of profit, US manufacturing firms

> sought to maintain their output and retain their markets by lowering their prices and accepting reduced profit rates, reproducing in the process system-wide overcapacity and over-production. Because they possessed great masses of fixed capital that was sunk, already paid for, these firms had every reason to try to retain their place in the market so long as they could make at least the average rate of profit on their new advances of circulating capital.[126]

125 These data come from the 'Key Financials' as recorded in the Fortune Global 500: Fortune 2023 'China Baowu Steel Group', *Fortune*. https://fortune.com/company/china-baowu-steel-group/global500/; Fortune 2023 'Jiangsu Shagang Group', *Fortune* https://fortune.com/company/jiangsu-shagang-group/global500/.

126 Brenner 2006, pp. 99–100.

In much the same way, pressed by the dominance of both the global brand monopsonies and the established contract manufacturer monopolies on which they depend, mainland firms have aggressively lowered prices, accepted razor-thin profit margins, and expanded their productive capacity as fast as possible. China therefore appears to be trending toward the global norm, its heavily monopolised industrial firms competing in a cutthroat market intricately intertwined with the state and saturated by overcapacity, with macroeconomic stability increasingly reliant on volatile speculative bubbles that pour wealth into the hands of often-distant land developers and corporate shareholders, all leading to an intractable rise in inequality and expanding precarity.

9 The New Flesh

In other words, as fixed capital metastasises, the planetary factory seems to be increasingly emptied of human life. The poems of Xu Lizhi thereby take on a prophetic tone, weighted with the tragedy of his death. In the end, all the suicides and the desperate, defensive strikes won just enough in their defeat to keep the assembly lines running. Machinery marches like a conquering army through the factories. For Xu, the victory of capital and its machinic clock-time was visible in the displacement or invasion of human bodies by industrial objects. 'I swallowed a moon made of iron / They refer to it as a nail' he writes in one poem, describing a 'life covered in rust.'[127] In another, the very bodies of young workers are broken and remade in the image of industry: 'They have stomachs forged of iron / Full of thick acid, sulfuric and nitric … The jig forces the skin to peel / And easily plates on a layer of aluminum alloy.'[128] This theme of body horror runs throughout his work, where increasingly grim and grotesque poems show flesh trapped in cramped, damp and lightless spaces or muscle melding with infernal machines. In Xu's poetry, commodities invade not only the physical spaces of production and daily life but also art itself, as in his 'Obituary for a Peanut,' which is a poem rendered from the fine print on a can of peanut butter. The surreal, sardonic comedy of the piece gives its most mundane lines a strange portent: 'Factory Site: Factory Building B2, Far East Industrial Park, Brooktown North Village, Dragon Lake, Shantou City.'[129] The

127 Xu Lizhi [许立志], 'I Swallowed a Moon Made of Iron' [我咽下一枚铁做的月亮], in: Xu 2014.

128 Xu Lizhi [许立志], 'The Last Graveyard' [最后的墓地], in Xu 2014. I have slightly modified the translation of one line based on the original Chinese.

129 Xu 2016.

effect, of course, is contextual, since the poem is packed between meticulous illustrations of the myriad horrors bristling within each of these anonymous business parks.

At one level, Xu can be seen as continuing the Chinese tradition of vernacular poetry into the era of export production. But his work also lies within another, more subterranean style harking back to the hellish landscapes of early industrial England. After all, a very similar vernacular literature that documented the horrors of factory life emerged in the popular press of the early steam era. This proletarian literature showed in excruciating detail how,

> subjected to 'the almighty steam-engine' – the totem of the masters, with 'arms of iron but breath of steam' – [the workers] were offered starvation wages and diminished stature, turned adrift and forced to play a losing game against ever-improving machines.[130]

The theme that emerged in such work was what Andreas Malm has called a 'steam demonology,' portraying the advance of coal-powered industrial infrastructure using gothic tropes mined equally from Christian morality tales and gruesome reports of factory life.[131]

It is hardly a coincidence, then, that Xu's work most directly evokes that of Chartist poets such as Ernest Jones (a friend and regular correspondent of Marx and Engels), who describes the landscape of the period in hellish terms:

> What plague-cloud rolls across the darkened land,
> And hurls the sun away with shadowy hand?
> What wheels revolve in dungeons hot and black,
> Of modern tyranny the modern rack?
> What horrid birth from that unnatural womb?
> The demon god of factory and loom![132]

If Jones and others in the early trade union movement sought to grapple with the 'demon god' of the coal-fired factory, we might read Xu's poems as illustrating a symmetrical 'silicon demonology' that eulogises the lives lost to the threshing teeth of circuit boards and touchscreens. Each of his poems drips with blood. With raw hands, Xu traces the topography of the world-spanning horror until he feels his own impending death, eulogised alongside the rest: 'I

130 Malm 2015, pp. 237–378.
131 Malm 2015, Chapter 10.
132 Jones 1855.

know a day will come' he writes in the months before his suicide, 'when those I know and don't know / will enter my room / to collect my remains / and wash away the darkened blood stains I've shed across the floor.' And yet a few lines later he persists in a stoic hope: 'someone will help me write the poem I didn't have time to finish … someone will help me light the candle I didn't have time to light.'[133] The very horror of the body splayed open by industry also forces us to see that we extend beyond ourselves. Art spills from us to pool in open hands like ice cold water from some hidden aquifer. We struggle and fail. Communism is nothing if not the grand strategy of the lost cause, the delicate veneration of tragedy and defeat. And, of course, it is the art of torchbearing, spark-seeking, kindling quiet fires in rage against the dying light.

In the years after his body was removed from the coffin-sized room that featured in so many of his poems, the production lines in the surrounding factory complex began to downsize. Workers were replaced in that never-ending, always-losing game against the ever-improving machines. But, despite the suicides and the mechanisation, the workers themselves never disappeared. Foxconn's sparkling new plant in Zhengzhou drew in migrants from Henan's rural hinterland, soon overtaking the old plant in Shenzhen. In 2022, workers trapped inside and subject to stringent pandemic lockdowns escaped as if from a prison, fleeing on foot back to their country homes *en masse*.[134] In response, the provincial government encouraged army veterans and dedicated party members to take up posts on the assembly line while the company started a nationwide recruitment drive, enticing migrants from all over the country with promises of cheap housing and extensive bonus pay.[135] Those who arrived, however, were then met with a fraction of the wage advertised (most of it deducted to pay for the cost of low-quality on-site housing and cafeteria food). Meanwhile, the influx of workers triggered even worse Covid quarantines. In response, the new arrivals stopped work and staged a series of protests that quickly escalated into violent clashes, first with public health personnel – known as 'big whites' (大白) for their full-body PPE – and then with the riot

133 Xu Lizhi [许立志], 'I Know a Day Will Come' [我知道会有那么一天], in Xu 2016.

134 Friedman 2022a.

135 Feng, Coco 16 November 2022 'China county rallies retired PLA personnel to work at world's largest iPhone factory, bolstering its role in Apple's supply chain,' *South China Morning Post*. https://www.scmp.com/tech/policy/article/3199822/china-county-rallies-retired-pla-personnel-work-worlds-largest-iphone-factory-bolstering-its-role; Feng, Coco 7 November 2022 'Foxconn Zhengzhou woos fleeing workers with US$70 subsidy after Covid-induced exodus hits iPhone capacity,' *South China Morning Post*. https://www.scmp.com/tech/tech-trends/article/3198694/foxconn-zhengzhou-woos-fleeing-workers-us70-subsidy-after-covid-induced-exodus-hits-iphone-capacity

police sent in to quell them. In one particularly striking scene, workers ripped free one of the sheet metal walls meant to hold them in quarantine, mobilising it as a shield against tear gas and rubber bullets as they advanced on police lines, hurling bricks and insults.[136] In the end, the company offered the new recruits 10,000 RMB (~1400 USD) each to simply leave (8,000 to tender their resignation, 2,000 when they boarded the bus home), substantially more than the 500 RMB (~70 USD) bonuses it had offered to recruit them in the first place.[137] The sheer amount of the payoff seemed to signal the firm's terror at what it had unleashed.

Evidently, the same blood poured into the steam engine still pours into the semiconductor, not to mention the streetside stall and the shopping mall and the cubicle of the software engineer working nine-to-nine six days a week. In the end, it was this blood – pulsing vital, overcrowded in the city streets like veins – that was the real subject of Xu's poetry. His own words prove the only adequate epitaph:

> I speak of blood, because I can't help it
> I'd love to talk about flowers in the breeze and the moon in the snow
> I'd love to talk about imperial history, about poems in wine
> But this reality only lets me speak of blood
> blood from a rented room the size of a matchbox
> narrow, cramped, with no sight of the sun all year
> extruding working guys and girls
> stray women in long-distance marriages
> Sichuan chaps selling mala tang
> old ladies from Henan manning stands
> and me with eyes open all night to write a poem
> after running about all day to make a living
> I tell you about these people, about us
> ants struggling through the swamp of life

136 Jiang, Ben and Feng, Coco 23 November 2022 'Violence erupts at Foxconn Zhengzhou plant as workers protest over benefits and Covid-19 controls at world's largest iPhone factory,' *South China Morning Post*. https://www.scmp.com/tech/big-tech/article/3200747/violence-erupts-foxconn-zhengzhou-plant-workers-protest-over-benefits-and-covid-19-controls-worlds

137 Feng, Coco 24 November 2022 'Foxconn offers US$1,400 to new hires to leave Zhengzhou factory after violent protests over benefits and Covid-19 controls,' *South China Morning Post*. https://www.scmp.com/tech/article/3200770/foxconn-offers-us1400-new-hires-leave-zhengzhou-factory-after-violent-protests-over-benefits-and?module=lead_hero_story&pgtype=homepage

drops of blood on the way to work
blood chased by cops or smashed by the machine
by casting off insomnia, disease, downsizes, suicide
each explosive word
in the pearl river delta, in the pit of the stomach of the country
eviscerated by an order slip slicing like a *kaishaku* blade
I tell you these things
even as I go mute, even as my tongue cracks
to tear open the silence of the age
to speak of blood, of the sky crumbling
I speak of blood, my mouth all crimson[138]

138 Xu Lizhi [许立志], 'I Speak of Blood' [我谈到血], in Xu 2014.

CHAPTER 4

Circle of Madness

Eventually, the 'worker culture' band finished their set, and the workers finished their beers, and the staff dimmed the stage lights. The warm, sad glow of nostalgia receded. In its place the darkness pooled heavy as tar, drawing in the eye and drowning it. The musicians were gone. One by one, the workers trickled out of the loud, glass-walled bar to their dorms or to their dilapidated roomshares further afield in the space where mouldering industrial suburbs met the insect-hissing ruins of ancient marshland. In earlier dynasties, the humid river deltas of the south were a sort of prison housing disgraced officials exiled from the imperial court in the north. In less than a year's time, the labour centre these workers were affiliated with would be shut down and the organisers would similarly be forced into exile, as the long foretold 'labour movement' was slowly and surely strangled in its crib. After a while, I realised that the only lights remaining were those of the variety shows cascading across the screens of the giant sportsbar TVs, and there was no one left but myself and the staff, one smoking in the corner, another putting up chairs and a third finally hefting the oversize remote – a pirate apparatus clearly patched together in one of the city's many alleyway workshops – to turn off each screen one after the other, every burst of pastiche culture and garish colours blinking to black in a chained sequence. It was still early, I thought. Or maybe I'd been sitting for longer than I realised, time slipping past cold and quiet as water through the marsh. When I asked one of the staff why they were closing she just shrugged, as if it were not a thing that could be explained.

As each screen died, the darkness swelled inside the glass cage and the glare that obscured the outer world dimmed. I could now see that foot traffic on the plaza beyond the floor-to-ceiling windows was winding down with the uneventful night. I pulled out my clip of crisp red money and peeled off a single bill – these were the final years before the widespread switch from cash to mobile payments – placing it on the fake black marble of the bar where the weight of the paper curling in on itself like a flower petal on a stagnant pond seemed to cast ripples out into the liquid darkness, drawing the bartender, who took the money and then returned to her corner where she stared into the soft flicker of her phone. The transaction complete, I too was untethered. I stepped out into the swallowing humidity and wandered through the dimming plaza, at first aimless and then unconsciously pulled toward the one edge of the square that seemed livelier than the rest, bodies milling around an LED-rimmed open-

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ing that I at first mistook for an entrance to the subway system. But in those years the subway did not extend this far into the industrial districts. I watched bodies sink past the LEDs down into the yawning darkness, and eventually I followed them. The cold air from below wrestled with the warm air above, like an icy wind beat upward by the churning of some demonic engine buried in the world below.

At the bottom, the stairs gave way to what seemed to be a field of dark ice specked with the cold glimmer of LEDs. As my eyes adjusted, I saw that it was an underground market – a common curiosity produced in the course of rapid urbanisation, ranging in style from the formal spaces sprawling out from subway stops or built on below-ground floors of new shopping centres to strange commercial cavern systems snaking through tunnels excavated under roads and between the basements of buildings awaiting demolition. In Shenzhen, rapid development also meant that many of the most informal of the subterranean shopping complexes had long ago been demolished, the stalls of the migrant merchants forced both aboveground and further out toward the city's edges as the world below was monopolised by the ever-expanding web of the metro, itself a vast underground system of buried shopping malls and ticket stalls sprawling beneath the surface of the city.

This particular market seemed caught in some strange stasis between construction and demolition, either in the process of being built or (more likely) being abandoned and torn down. The black cement floors glistened, maybe freshly poured, maybe mouldering. The air was heavy with the scent of newly unfolded plastic tarps and pulverised stone. A labyrinth of booths lined the wall and cut through the main floor, vendors demonstrating their gadgets or yelling out special discounts. But just as many lay empty, their scratched bare counters perched in front of yawning shadow like altars recently cleared from the mouths of mist-filled grottoes. Commerce in such subterranean spaces seemed always to serve the superstitious edges of subsistence, each stall selling an abundance of goods not quite necessary to everyday life but also not quite ancillary to it either: multicoloured phone cords, charging cubes, shoelaces, baseball caps, small lamps to light one's dormitory, friendship bracelets, whirring toys, bedazzled phone cases, anime emblems, miniature tools for repairing electronics, and sometimes bits of gutted computers, phones, or various household appliances – circuit boards splayed on the counter like rabbit skins set out to dry, cooling fans strung up like roast ducks, all kinds of microelectronic motors arranged delicately like bird bones or the skulls of small, shivering mammals.

As I wandered deeper, the cavernous market twisted in arcane curves that budded into new chambers, the space proving far larger than I'd first assumed.

Along the walls more stairways went up to the surface, but other openings gave way to tighter tunnels where the booths crowded in on one another before narrowing to claustrophobic dead-ends. Here and there, propped-open service doors even hinted at hidden ladders going down to further depths. The place appeared to be an entire orphic city seething beneath the megalopolis – as above the bowery of skyscrapers raised into the typhoon winds, so below these tunnelled roots like the digging fingers of the dead. Everywhere the AC seemed turned down to an unnatural degree, customers dressed like myself for the summer heat walking fast and rubbing bare arms for warmth. One especially busy stall was selling hoodies, each emblazoned with the kind of incomprehensible writing sometimes glimpsed in dreams and immensely popular on the Chinese market: English sentences where the font and placement of the text all seem natural until you try to read the phrase, at which point each word proves to be something only wordlike, the illusion of meaning but not the actual thing. After walking for a while, I realised that the malls might even extend beneath the factory campuses here and there. I could almost feel the heat descending from the surface if I raised my hands toward the ceiling. Though likely passing just below the sidewalk on the edges of the business parks, my mind filled instead with images of production lines humming overhead, their inferno of activity radiating heat down through the concrete into the caverns. I imagined feet tapping against the ground above as bodies packed like machines along the conveyor belts, the moisture dripping from exposed pipework in the ceiling of the underground market in fact the condensed breath of the workers, the sweat shed by their frantic limbs, dripping through the cracks in the floor. Or maybe the dull roar of the enclosed space was actually the whirr of industrial robots, their arms grasping loaded pallets, power tools screeching from metal appendages as human technicians padded carefully through the rows checking bolts and punching codes into keypads.

1 Arcanum

In a strange way, the image seemed to invert that presented by Marx, or at least that of Marx as he is often presented to us. After all, the cover of the most widely sold English edition of *Capital* confronts the reader with a painting of a metallurgical process underway in the innards of some forge, offering an immediate view of what, in the text, is only slowly revealed as the 'hidden abode of production.' At the centre of the image stands a mass of industrial workers reaching into the flames with calipers. For Marx, we might imagine that the glowing pool of molten metal is also something more: an aquifer storing the 'social sub-

stance' of value itself, which, drawn from the blood and sweat of the workers, can then be pumped out in the form of capital. Beyond the infernal scene lies only a subterranean darkness, as if the factory were churning somewhere in the depths of the Earth and its molten heat being drawn up to power the commercial society on the surface. But in the shadow mall beneath Shenzhen, the image is reversed: the forge of industry is instead recast as the world's firmament. The celestial sphere of the factory encases the LED-lit bowels of a social system in which basic subsistence is sewn inseparably into the seams of commerce, the effluence of manufactured goods spilling from the abode above in a heavenly flood from which we proletarians – servants, street hawkers, social media scrubbers, and steelworkers alike – might glean survival, enjoyment, maybe a pittance of art and invention like rats hoarding shiny objects as they burrow through the brimming ruin.

Even those who ascend now and then to pour blood into the starry forge of industry often find little more than an alien process, the mere assembly of microelectronic components whose complexity is writ in silicon spirals invisible to the naked eye. In the garment sector, where manufacturing at least retains some of its handicraft character, the same alien complexity emerges at the macroscopic level: 12-hour shifts in which a single worker produces 1,000 simple designs, 500 mid-range, 300 complicated pieces, the materials, styles, colours, and of course quantities determined by the arcane spiral of the 'Manufacturing Execution System' connecting speculative end-market research mined from advertising algorithms to rapid-fire designers to an entire constellation of suppliers subcontracting to friends and relatives and drawing inputs from another constellation of wholesalers before shunting the products to sprawling warehouses where the 'just-in-time' of logistical perfection is ensured by pickers running dozens of kilometres per shift hurling parcels from pile to pile, with every component of the process constantly recalibrating at the frenetic pace of 'ultra-fast-fashion.'[1] The circuit of capital is a spiral drawn ever upward, money like a spirit risen into the body of the commodity only to spill out from it again in rapturous plenty. Passing through the gyre, capital ceases to even be embodied in 'human person' or 'human class' at all but instead becomes, in Bordiga's words: 'the Monster, objectified labour, fixed cap-

1 The terms and numbers here are taken from the few available descriptions of Shein's supply chain model, as described in the following: Ma Rui 16 June 2022 'What Chinese media reveals about Shein's secretive operations', *rest of world*. https://restofworld.org/2022/shein-supply-chain-success/; Wu Peiyue 17 September 2021 'The Shady Labour Practices Underpinning Shein's Global Fashion Empire', *Sixth Tone*. https://www.sixthtone.com/news/1008472/the-shady-labour-practices-underpinning-sheins-global-fashion-empire

ital – monopoly and fortress of the *form of capital itself*. A Beast without a soul and, even, without life, but that devours and kills living labour, the labour of the living, and the living themselves.'[2] And our lives descend that same spiral, work a grave dug in hourly increments, a day of sugars burned and wages earned.

In previous centuries, it was still possible for workers across the world to look into the infernal space of the factory and still see in that molten light the basic outlines of a distant republic of labour where the machine would be again subdued by the hand of the artisan. Today, however, staring into the machine provides no beatific vision. In another common gothic trope, we instead find that gazing upon the monster drives one into a sort of spiralling madness. This is, in fact, what Marx himself saw in the future of the factory, scrawling out a warning for the revolution to come. In the pages of *Capital* – perhaps the greatest work of horror ever written, since its monstrosities refuse to be confined to the page – Marx whispers that there is a second world sunk in this one, tugging like a lightless, deathless thing imprisoned in the roots of the sensible. Not a different world, even, but this same one pooled like blood at the bottom of the spiral. The machine is set in motion by the eyeless twisting of an interred god. Ultimately, all the dynamics of price and profit documented in the surrounding chapters are epiphenomenal, like tides and waves undulating across the great sea of our total planetary productive power. Rather than the 'economy' presented in the form of plain facts that can be aggregated and processed through simple empiricism, we find self-reflexive social dynamics difficult to grasp precisely because our attempt to understand them is both constituted by and helps to constitute them as social forces.

The empirically measurable features of our commonsense surroundings are certainly real, but their reality is subordinate to a lower one, invisible, immeasurable, a stirring in the fathomless dark. And the currents coursing through this deeper reality are in essence esoteric, perceptible only by proxy. Though contiguous with the immediate world of economic objects – in fact, both near and as isomorphic to the sensible as a form to the shadow that it casts – such a realm can only be accessed through a winding path. Our tangible sphere and this deeper one are like two surfaces wrenched into one and strung along a Möbius strip. At any given moment, the two are neighbours separated by a thin veil: the one a reverse of the other and the latter merely the former traced back to its source. The lifting of the veil is the work that we call theory, following the obverse world of economic objects backward down the winding path until we reach these same objects again from their inverse.

2 Bordiga 2020, p. 467.

The abstract underworld of the economy (again: our own world but further) is a haunting place, extradimensional, where the open eye sees commodities strung upside down, phantasmic, their social innards spilling forth like black sulphur billowed from a hydrothermal vent. Once seen, such things cannot be unseen – or, we should say, thought and unthought. Even if we escape, these ghosts will linger in our minds long after leaving, their shadows hinting at the shape of some truer thing churning beneath the object and bestowing upon it a strange sort of spirit. Those who dwell too long or delve too deeply will, of course, become something like ghosts themselves. They will lose the ability to communicate in any of the human languages, speaking only in dialectical riddles. Follow the spiral path for long enough and eventually the world shatters into a spectral field with no beginning or end, just an endless upwelling. Anchorless, travellers in the further realms can no longer stop their downward slide. Surfaces bubble away from their grip in the alkahest of abstraction. Finally, at its bottom – or top, or centre, or maybe simply the shattered selvage in which all is edge and none nucleus at the spinning core of the antipode – there lies a delirious palace with rooms ever-shifting, walls covered in cracking layers of contorted cursive copied, edited, copied again, each howling its own mad interpretation of the holy texts. And somewhere in the lowest abyss sits the embalmed body of Marx himself, poised like the Maitreya Buddha, silent, serene, smiling like a clown.

2 Disintegration

Though the complexity of production takes different forms in the various sectors of the technical exoskeleton vaulted above the flow of human bodies, at no point do average workers in even the largest or most central factories today have the impression that the overall production process is something that they alone could administer. The political horizon presented in the mirage of the historical workers' movement has become an entirely alien landscape:

> the factory system no longer appears as the kernel of a new society in formation; the industrial workers who labour there no longer appear as the vanguard of a class in the process of becoming revolutionary. All that remains of this past-world are certain *logics of disintegration* …[3]

3 Endnotes 2015a, p. 75.

In the subterranean mall we see this disintegration made literal. Fragments of products pass through stalls segmenting a labyrinthine space into the hands of fragmented people, their lives scattered across the shattered schedules of multiple jobs and microenterprises, all time now abstract worktime such that even subsistence becomes a stressful business of continual shopping and sifting and streaming. And this separation is nonetheless unified by that very business: its consistency literal and visible in those paper fragments passed hand to hand or stuffed into safes in blood-red stacks – cash the haemoglobin of the social body-that-is-not-a-body – hopefully enough stolen, pilfered, or earned to survive another day in this world where all must be bought.

Nor have we departed here from Marx, for whom money was the necessary form of appearance of value. In fact, if anything we find ourselves much closer to the image of labour presented in the pages of *Capital*, if not on its cover. In the same way that Haff portrays the technosphere as 'entraining' humans to its larger purpose, then, we can imagine that the species is also entrained to a certain logic of value, dimly visible in the form of money, that both shapes our institutions and the nature of our very subjectivity. Because of the intricate coevolutionary character of the process, these emergent imperatives do not necessarily appear as an extrinsic compulsion, but instead as the 'natural' form taken by the social order. Within capitalist society, their immediate appearance is economic. The higher-order logic expressing the 'needs' of the social system – within which with human needs are only ancillary – is transmitted to its lower-order units (individuals, institutions, etc.) in terms of profit, wages, the drive for continual productivity increase, the need for liquidity, the cost of subsistence goods, etc. These imperatives seem to operate exclusively in terms of profit-oriented planning within firms and prices emanating from them, which signal where resources ought to be deployed across the system of private ownership. Goods are thereby ascribed distinct sums that express a certain social 'value.' But 'value' in this sense is a laminate concept that fuses multiple, layered meanings into a single term: simultaneously an amorphous, emergent outcome of a complex chain of appraisals, many of which appear qualitative, and an apparently measurable quantity that seems almost to be an attribute of the commodity itself.

Within conventional econometrics, the 'value' of an object is simply its cost on the market. The most common output metric is therefore 'value-added,' usually measured as the gross receipts of a firm (i.e., all of its sales and any other sources of revenue, prior to being divided into profit, wages, rent, interest payments, etc.) minus the cost of goods and services purchased from other firms. Both are calculated in price terms, and the added 'value' is therefore the additional money visible in the subtraction of all the prices of the inputs from all

the prices of the outputs. Profit is the final remainder of this money left after additional costs like wages, taxes, and rent have been paid.[4] For the most part, then, conventional economic theory is a theory of prices. At the practical level, it is an attempt to explain both macroscopic and microscopic dynamics in the movement of these prices across their various markets. At the more abstract level, it seeks to explain the emergence of these markets, determine how and why they might be cultivated or restrained, and understand how to manage the systems of money and international trade that undergird them. Since the communist critique of capitalist society is, in part, articulated as a critique of these prevailing economic theories, it is often seen to be engaging with these theories on their own ground. Thus, Marx is portrayed as offering an alternate 'economics' (complemented by but distinct from his 'philosophy of history' and 'sociology') or even formulating a specifically 'Marxist political economy' on the basis of an alternate theory of prices derived from his 'labour theory of value.'[5]

But Marx's critique of political economy was, in fact, a much more fundamental rejection of the field's basic premises. In the words of historian Michael Heinrich, whose scholarship focuses on Marx's life and work: 'Marx's intent was not to provide an alternative "political economy" … his critique was aimed rather at the *entirety* of political economy – he wanted to criticise the *categorical presuppositions* of an entire branch of knowledge.'[6] First, Marx went to great lengths to demonstrate the ideological character of political economy, both in the mundane sense of proving that the political economists themselves represented the interests of the ruling class and in the more significant sense

4 Technically (as calculated by the BEA), the residual left after subtracting total intermediate inputs, compensation, and taxes (less subsidies) from total output is the gross operating surplus, which includes profits as well as three other sums: the 'proprietors' income,' a measure of depreciation of plant and equipment ('consumption of fixed capital'), and a general category capturing any other payments not recorded elsewhere ('business current transfer payments net).'

5 Although *Capital* is very clearly introduced as a 'critique of political economy,' this 'critique' is here understood in a limited sense, as being similar in kind to the political economists' critique of the mercantilists, or the monetarists' critique of the prevailing postwar consensus. Such frameworks for understanding Marx's project became so thoroughly established in the course of the twentieth century that citing any single source to demonstrate the basic phenomenon is not only disingenuous but also risks overemphasising the negative influence of particular interpreters (for example Engels, Kautsky, or various thinkers who would go on to compose the Soviet orthodoxy). Such 'misreadings' were so common across otherwise competing schools of thought that their cause is clearly more complex than simple intellectual error or political infidelity. For an overview of the issue, see: Clarke 1991, pp. 92–6.

6 Heinrich 2012, p. 33.

that the seemingly natural economic objects these theorists examined, such as the commodity, are actually 'alienated' forms that serve to simultaneously disguise and enact more fundamental social relationships. These social relationships were the true object of Marx's inquiry, and the critique of political economy in the pages of *Capital* was therefore more of a political argument about the social nature of production than a technical argument for an alternate theory of prices that would enable better macroeconomic administration by and for industrial workers. As argued by William Clare Roberts, who studies the political history of Marx's thought: 'Marx wanted to publish a work that would be *both* a systematic treatment and a thoroughgoing critique of *both* the capitalist mode of production and the political economy that reflected and justified it.'[7] Marx's ultimate political concern was therefore not simply with changing the distribution of resources within society but, in Heinrich's words, 'primarily with the *emancipation* from a social nexus that takes on a life of its own and imposes itself upon individuals as an anonymous compulsion.'[8]

But this does not mean that the critique of political economy therefore offers no theory of capitalism as an economic system. It simply demonstrates how what we think of as the 'economic' sphere is a form of appearance of society itself. In fact, as sociologist Simon Clarke, yet another scholar who studied the history of Marx's work, points out: 'In revealing the social determination of [economic] categories the critique of political economy uncovers the social foundations of the laws of development of capitalism.'[9] This is what allows the communist critique of capitalist society to demonstrate that there exist real and irresolvable 'contradictions' that fundamentally prevent development from ever proceeding smoothly, harmoniously, and free of crisis. Similarly, such contradictions also ensure that the wealth of society will never be adequately used to serve human needs, despite its continual growth, and will instead be allocated into the hands of a continually maintained and reproduced minority of social elites whose distance from the lower social strata will also tend to grow. As a result, seemingly archaic horrors like homelessness, famine, and death and disability caused by preventable disease will proliferate even though we possess abundant material and technical means to prevent them. Thus, what Marx offers instead of a mere 'economic' critique is a broader political polemic against a particular form of social domination in which the needs of the human

7 Roberts 2017, p. 23.
8 Heinrich 2012, p. 221.
9 Clarke 1991, p. 99.

species are made subordinate to those of 'the economy' as if it were a separate sphere of activity governed by its own natural laws separate from and superseding those of society.

3 Blood of the Beast

However, in broaching the subject of value, we again run into a common misconception: the idea that Marx offers a 'labour theory of value' that carried on from, completes, or otherwise supersedes that of classical political economy – specifically that of David Ricardo – and which is ultimately intended to prove the existence of exploitation in the workplace.[10] Marx does of course argue clearly and unambiguously that value is extracted from labour in the process of production and that, given the fact that more value is extracted from the worker than is returned to them at the end of the workday, the labour process constitutes the basic engine of exploitation producing the social surplus that then accrues to the ruling class, as capital. But the point of this argument was not to prove the mere existence of such exploitation, which was a plain fact both immediately visible to workers and owners alike and already widely acknowledged within the socialist literature of the time. Nor was it to simply demand, alongside the Ricardian socialists of the era, that 'labour is entitled to all it creates,' implying that the end-goal of a socialist society was merely a more equitable distribution of the final product. He was instead questioning why our collective productive capacity appears to us in the peculiar form of labour at all.

This is the reason that Marx's critique of political economy places such emphasis on the relationship between value and labour. Rather than elaborating on the classical 'labour theory of value,' then, Marx is better understood as counterposing a 'value theory of labour.'[11] As socialist economist Diane Elson argues:

10 This interpretation is important not simply in the historical sense, as the basis of various 'Ricardian socialist' claims popular in Marx's day, but more so because similar positions have been resurrected in a much-reduced form within both the 'socialism' of left-populist progressives in the US and Europe and within the official doctrine of the 'socialist market economy' adopted by the Chinese state and widely accepted within the social sciences in mainland China. This (mis)reading of Marx is therefore the basis of what we might think of as a worldwide revival of classical liberalism in a 'socialist' guise.

11 We could also think of it, more specifically, as 'The Labour-Power Theory of Capital.' For an overview of the basic argument updated in response to more contemporary misunderstandings of Marx, see: Gouldhawke 2022a.

> the *object* of Marx's theory of value was labour. It is not a matter of seeking an explanation of why prices are what they are and finding it in labour. But rather of seeking an understanding of why labour takes the forms it does, and what the political consequences are.[12]

Clarke gives further detail:

> Where Ricardo's labour was the labour-time of the individual embodied in the product of her labour, which thereby constituted that product as her property, Marx's labour was not individual but social labour, the attribution of that labour to the individual only appearing in the form of the attribution of a value to the commodity. It is only in the alienated social form of commodity production that the labourer's own activity, as part of social labour, confronts the labourer in the form of a quality (value) of a thing (the commodity), which can thereby be appropriated as private property.[13]

For this reason, Marx was careful to distinguish embodied labour – or simply work in the physical sense, understood as the raw time it takes an average worker to produce a given product, which we might even measure in terms of kcal burned – from an even further-abstracted form of 'alienated' labour defined by 'the labour-time socially necessary to produce the commodity,' which is of course a quantity set only through the market.

It is this specific form of marketized labour (really 'labour-power') rather than 'embodied labour as a universal substance,' that serves as the magnitude of value within capitalist society:

> Value is labour for others; labour in so far as it is socially recognised within a division of labour; labour whose social character has been abstracted from the activity of the labourer to confront the labourer as the property of a thing; labour whose human qualities have been reduced to the single quality of duration; dehumanised, homogenous, in short *alienated* labour.[14]

At its core, this process of alienation and abstraction is enabled through the general application of market imperatives to workers' activity via the wage and

12 Elson 1979, p. 123.
13 Clarke 1991, p. 97.
14 Ibid.

the sale of final products. Though exploitation occurs in the workplace, it is only confirmed on the market. But the process also results in the 'dehumanisation,' 'homogenisation,' and 'alienation' of labour in a more colloquial sense, insofar as the application of these market dynamics to the concrete process of production imposes increasingly elaborate sociotechnical subdivisions that separate workers from one another and from the products of their own labour. These social consequences of market pricing are all inherent in the notion of 'value' used by Marx, and any political project seeking to eliminate social domination and exploitation in the workplace therefore requires the dismantling of value as such and the ability to correctly distinguish between this broader social notion of value and its narrow appearance as price. Communist thinker Paul Mattick offers an easy way to understand the distinction: 'value is an explanatory category, price an empirical one.'[15] Thus, 'for each commodity there is *both* a value (in the theoretical analysis of social labour under capitalism) and a price (in economic reality).'[16]

To summarise: the aim of the communist critique of capitalism is less about understanding or modelling the economy in its conventional form of appearance (as a commercial system in which commodities are allocated according to price signals) and more about understanding why, within capitalist society, 'the economy' comes to exist as a seemingly autonomous sphere that requires a specific form of labour subject to the time-discipline of the factory and to myriad forms of direct and indirect social domination (by capitalists as specific individuals and by capital in the abstract), all of which seems to induce a particularly fast pace of productivity growth that increases material throughput and embeds increasingly large and complex physical infrastructures in the crust of the earth, vastly aggravating the metabolic draw exerted by the sociosphere on the other geospheric systems.[17] Such a critique has immediate political implications. Marx quite obviously thought that a better understanding of capitalist

15 Mattick 2018, p. 153.

16 Ibid.

17 While it is possible to use this understanding to construct robust models of price trends and the more general monetary system which may, in fact, enable the better administration of this system, the true political purpose of the project is entirely the opposite. The work of Anwar Shaikh (2016) is one example in which the categories of political economy, refined by the Marxian critique, are used to produce a robust series of (basically neo-Ricardian) models of the price system that exceed most orthodox models in their predictive power. Similarly, Andrew Kliman (2011) uses more strictly Marxian categories to model macroeconomic trends using careful modifications of conventional business statistics. What such models gain in empirical refinement, however, they tend to lose in political focus.

society would be an invaluable weapon aiding in its destruction, and *Capital* was therefore designed as a political intervention both explicating the particular form of social domination that prevails within capitalism *and* arguing against the various forms of weakly anti-capitalist socialism that were at the time dominant in the workers' movement, threatening to draw that movement down tempting dead-ends. In other words, the problem was not simply that such positions were wrong in theory, but that these theories provided nascent revolutionary movements with an incorrect set of practical coordinates that would then set them in the wrong direction entirely, wasting their scant resources in hopeless ventures doomed to fail: 'Marx was convinced that capitalism was not a simple problem, amenable to simple solutions, and that the "solutions to the social question" circulating and competing for attention within the workers' movement – cooperative colonies, people's banks, monetary reform, nationalisation of land – were so many mirages and distractions along the path to real emancipation.'[18]

But understanding that certain concepts are the 'alienated' appearances of deeper social dynamics does not mean that theories of price, for example, are unimportant or that features of the economy as they appear to us are simply illusions. Money does not get its social power merely from the fact that we believe in it, but because this belief is undergirded by real consequences. Whether you imagine the digital ledger behind your debit card to represent some sliver of 'true' value or not, you still need those numbers to be positive if you expect other people to provide you with the food and shelter you need to survive. You are, in other words, *forced to believe*, whether you want to or not. The compulsory reality of these social relationships is precisely what the concept of value attempts to explain. Price is therefore best understood as something like the surface of the ocean of value, its waves and tempests deeply linked to but not synonymous with the great tidal churning of the abyss beneath.[19] At its most fundamental level, 'value *is* social labour *as represented in* the price form.'[20]

Nor does this mean that 'value' is the independent variable and 'price' its dependent marionette, or that labour time is the hidden puppeteer of both.[21]

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18 Roberts 2017, p. 23.

19 Rather than two separate substances requiring some sort of 'transformation' from one to the other, price should simply be understood as value's outward aspect. Thus, asking how value transforms into price is like asking how the ocean is 'transformed' into the waves that sit on its surface.

20 Mattick 2018, p. 153.

21 As Elson argues: 'The quantity of socially necessary labour-time does not determine the

Labour, value, and price are all real and their relationship is continuous but not commensurate: whereas price demonstrates 'the conditions of production as experienced by the firm,' value demonstrates 'these conditions as envisioned from the point of view of society as a whole.'[22] Meanwhile, labour-power is both the substance (as abstract labour) and magnitude (as socially necessary labour time) of value, while money and prices are its 'necessary form of appearance.'[23] Thus, as socialist economist Makoto Itoh explains, 'the historical singularity of capitalist production appears when the forms of value which constitute the commodity economy in general encompass the *social* labour process' and, within such a society, 'all the social relations of labour quantities must be dealt with entirely through value forms. Therefore, value forms acquire a social substance in the quantitative relations of labour time.'[24] This 'social substance' is, for lack of a better metaphor, the lifeblood of the material community of capital, appearing both in a fluid form in monetary transactions or day-to-day work and in a congealed or crystallized form within the material objects spit out of the production process, including our own built environment and even the novel ecosystems constructed as ancillaries of accumulation.

Ultimately, value is 'substantial' in the sense that it behaves like a quantity – divisible and measurable across objects (via money), similar to weight, and exerting a force scaled to its magnitude – but it only takes on these characteristics within a certain field of social relationships. In a fundamental sense, value is synonymous with these social relationships, or is at least something like their emergent effect. And yet it also is substantial in the sense that it exerts a very real physical force on the world around it. Accumulation therefore also implies a certain geography of value. This is of course true in the literal sense, as capital's historic movement encrusts industrial facilities into

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magnitude of value in the logical or mathematical sense of an independent variable determining a dependent variable, (or in the sense of defining the meaning of the term 'magnitude of value'), but in the sense that the quantity of a chemical substance in its fluid form determines the magnitude of its crystalline or jellied form. There is a continuity as well as a difference between what determines and what is determined … labour-time, value, and exchange-value (price) are not three discretely distinct variables, nor are they identical with one another. There is a continuity as well as a difference between all three. The relation between them (in any combination) is *not* posed in terms of an independent variable determining a dependent variable' (1979, pp. 133, 135).

22 Mattick 2018, p. 153; p. 156.

23 Moseley 2016, p. 29.

24 Itoh 2021, p. 90; p. 98.

the surface of the Earth and channels specific populations of workers such that they pass through particular places and depart from others. But it is also true at a higher level of abstraction, since the production of particular quantities of value relies on a series of inset and unequal dependencies stretched across and between sectors, between firms, and between workers which, altogether, take on the spatial structure of a graph network, distantly visible in the commonsense notion of the economy as a system of material 'flows' that contains 'upstream' and 'downstream' portions linked together through supply chains composed of nodes that can be organized in rough hierarchies. Wrung as blood from the tempestuous mass of the working class, in which individual workers are buffeted against one another like a murmuration of wind-wracked starlings caught in a storm, value descends from the firmament of production to cover the planet in a warm and ruddy rain. Across the surface of the planet, it hardens into great expanses of steel and concrete, the remainder flowing off in fast torrents drawn by the downward pull of accumulation. This flow cuts narrow channels in the upstream territories, where value is sparse and departs quickly, before descending to the great alluvial plains where the vast rivers of blood slowly weave their artful braids.

4 The Fable of the Parasite

But the geography of value is more than a simple system of material flows. In fact, overemphasising this substantial side of value always risks a deeper error, in which capitalist production is portrayed as an essentially extractive process that simply draws embodied labour out of humanity and natural resources out of the non-human world at ever-expanding scales. In this view, the surplus that results from production is merely the result of inherently fraudulent economic mechanisms latching onto external sources of natural wealth in an extensive fashion. This is, in fact, an old fable: capital as little more than an alien parasite sucking the life out of an otherwise healthy organism. Rosa Luxemburg offers the classic example, arguing that the realization of surplus value 'is a priori bound up with noncapitalist producers and consumers' so intricately that 'the existence of non-capitalist purchasers of surplus value is thus an immediate, vital condition for capital and its accumulation, and is as such the decisive factor in the problem of capital accumulation.' Capital's own drive toward territorial expansion then undercuts its ability to reproduce itself by eliminating these 'noncapitalist purchasers of surplus value.' More than this, Luxemburg even argues that capitalism in the abstract cannot even be conceived of in the absence of the 'noncapitalist sphere' that forms its 'milieu' or environment:

'the accumulation of capital cannot adequately be presented under the presupposition of the exclusive and absolute dominance of the capitalist mode of production …'[25]

Though such a claim was perhaps believable in an era when the vast majority of the world population were still subsistence farmers, today it is obviously untenable. Our hellworld is precisely one defined by 'the exclusive and absolute dominance of the capitalist mode of production.' And yet theories of capitalism as merely a system of exogenous plunder have, if anything, only become more common. However, the progress of the great enclosure has forced most of these theories to deploy updated version of Luxemburg's basic claim. Rather than identifying absolute limits to social reproduction in the use of non-capitalist markets to ensure the realization of surplus value, these theories instead stress the reproductive conditions necessary for surplus value to be created in the first place.

The basic argument involves two crucial shifts. First, non-capitalist social relations are relocated. No longer forming a literal geographic border encircling capitalist society, they instead permeate the mode of production itself, either in the form of amorphous pools of un- or under-commodified wealth or creative capacity that can then be plundered (per Daivd Harvey's 'accumulation by dispossession,' visible in everything from credit bubbles to the rollback of welfare) or in the form of the un- and underpaid work necessary to reproduce labour-power as a commodity in the first place. Second, the material inputs from the non-capitalist sphere on which capitalism relies are also displaced downwards, so to speak, into the earth system. The natural environment (or, in Moore's terms, a particular, historically-constructed world ecology) is thereby rendered as the other ultimate source of the 'unpaid work/energy' necessary for the production of value.[26] Altogether, these unacknowledged foundations of value are then often equated with a primordial 'commons' that serves as both the font of the social surplus plundered by capitalist production and as the site of social struggle which, in this formulation, largely strives to preserve, return to, and proliferate these essentially communitarian spaces in opposition to 'neoliberal' measures.[27]

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25 Luxemburg 2015, pp. 262–263.

26 Moore 2016, p. 54.

27 Variations on this basic position are so widely held that they cannot be ascribed to any one thinker or any single school of thought. Very broadly, much of what is called "social reproduction theory" today falls under this definition, as does much of the humanist Marxist tradition. For a more detailed appraisal, see Roberts 2020.

And, although Luxemburg came to represent the classical formulation of this 'exogenous' theory of value, the notion itself precedes her and, in fact, recurs throughout the history of capitalism. As Marx recognized, the alienated appearance of capitalist society continually casts up commonsense forms of anti-capitalism that, upon closer examination, prove dangerously simplistic. After all, ideology is always doubled: orthodoxies generate symmetrical heresies, each mirroring and bolstering the other. Commonsense views of a given social world also generate an array of equally commonsense views about how to change or escape it. The danger of such views is not simply that they are wrong but that they are, in practice, nothing more than advanced methods through which that social world is preserved. In contrast to this simplistic picture of capital as the mere robbery of the many by the few or as the unchecked abuse of natural resources, the theory of value demonstrates something more: capital develops through an intensive process of exploitation that not only plunders external sources of wealth but also 'subsumes' them – transforming the basic capacities of the human species and various natural systems by progressively incorporating them into capital's own circuits of reproduction.

In addition to being a rigorous attack on orthodox social theory, then, Marx's critique of political economy was also a political intervention against earlier forms of socialism that were, in his view, merely heresies produced by the commonsense worldview of this orthodoxy, to which they remained subservient. Then, as now, weak forms of anti-capitalism almost universally adopted this fable of capital as an essentially parasitic form of gluttonous plunder. In fact, earlier socialists were explicit in identifying capitalist exploitation as little more than a continuation of feudal relationships, portraying 'commercial society as an "empire of force and fraud"' in which 'the near monopoly of the wealthy over the means of exchange is a self-perpetuating engine of unequal exchanges.'[28] Within this fable, capitalists are something like landlords reinvented within the sphere of modern industry, their wealth secured through the simple robbery of their subordinates. In such an account, 'force precedes and distorts exchange, which ought to be – but is not, yet – an exchange of equivalents.'[29] Thus, 'exploitation is a remnant of feudalism … figured in terms of a monopoly power derived from conquest.'[30] Since this monopoly allows the wealthy to wield an outsize bargaining power within the market, it thereby 'ensures that the poor producers are never able to exact a fair price for their

28 Roberts 2017, p. 72.
29 Roberts 2017, p. 108.
30 Roberts 2017, p. 116.

products, leaving them in the same penury and need of purchasers as before.'[31] Among the major political aims of *Capital* and of Marx's many engagements with the various socialist and republican thinkers of his era was to overturn this simplistic view, arguing that capitalist exploitation cannot be reduced to parasitic extraction. Nonetheless, the idea of capitalist production as nothing more than disguised feudal plunder persisted long after Marx's death and has since even been reproduced in his own name.

Capital is certainly parasitic and has often been portrayed as blood-drinking. Marx himself famously compared it to a vampire. But this metaphor was already well-established by (at the time) better-known socialist thinkers like Pierre-Joseph Proudhon, who not only made use of the vampire metaphor but also equated the process of accumulation to the parasitic hunger of a particular species of blood-sucking tapeworm 'depicted … as a serpent with coils and a head with many suckers' which he then 'compared to the many-headed beast of the Apocalypse.'[32] While effective, the parasite analogy is also too simple. It implies a strong separation between capital and the human species or the natural world, with the former a force of death merely drawing on the latter, seen as the eternal font of life and aquifer of souls. But, if capital were simply a parasite latched onto the living world, we'd be left with only two possible futures: either the parasite is biotrophic and must somehow let that authentic world go on living much as it has – development somehow always leaving a periphery of authentic lifeworlds from which to feed, untouched by the economy – or it is necrotrophic, leading to the slow death of its host as it consumes the last dregs of a defiled world. The only escape from either future is then founded on a humanist appeal to that natural, vital force on which the parasite feeds, either in the mobilisation of 'humanity' as a sort of undifferentiated and irreducible creative capacity or in the appeal to various 'traditional' or subaltern lifeways not yet fully subsumed by the logic of capital.[33]

Despite ultimately tending toward the necrotrophic outcome (in his vision of 'total subsumption') and proposing the latter path of subaltern secession from the material community of capital, Camatte's notion of domestication at least gestures beyond the false antinomy of this parasitic metaphor

31 Roberts 2017, p. 72.

32 Goldhawke 2022b.

33 Despite all protests to the contrary, this simplistic Manichean image – of class war as a battle of the spirit, of local lifeworlds posed against Babylonian corruption, or as an opposition between verdant natural life and the cold rationality of industrial necrosis – has in fact always served as a central element of the far-right mythos, openly invoked by fascist political projects and elaborated by right-wing philosophers such as Martin Heidegger and Aleksandr Dugin.

to glimpse the grim reality that capitalist society is in fact something much worse. And Xu's body horror is even closer to the truth: capital not as a parasite but as a transmutation of the flesh, advanced through the process of real subsumption.[34] Ultimately, the material community of capital is not simply the death-bringer, ecocidal destroyer of lifeworlds, but also a source of saprophytic vitality, a death-eater that digests the bones of its many genocides and, from them, crafts more monstrous worlds in which even death may die. Passing through this undead circuit of capital, life itself is cultivated in containment and slaughtered slowly – labour sliced off the body in hours stretched over a lifetime of domestication. And the only way for such a death-eating civilisation to proliferate is not through plunder alone but through the ongoing creation and decomposition of new forms of life. While capital is certainly parasitic, then, it is also a kind of catalyst inducing new and wide-ranging changes in its host, better captured by the tropes of vampiric or lycanthropic transformation invoked by Marx than in Proudhon's metaphor of the hydra-headed tapeworm.

Rather than a parasite driving its host to death, then, capital is constituted through an undead metamorphosis, allowing its insatiable appetite to entirely exceed the natural cycling of death, decomposition, and rebirth. Within the material community of capital, this higher-order unity of creation and destruction is most clearly expressed in an uneven process of territorial development, where certain regions are actively under-developed even while others are subject to sudden spurts of hyper-development – and just as many caught in exten-

34 'Real subsumption' describes the continual transformation of the technical process of production to better accord with capitalist imperatives. It is contrasted to 'formal subsumption,' in which skills originally performed outside of the market are initially marketised without changing their concrete content. The most common example is that of textiles production, in which artisanal production of basic fabrics is first formally subsumed into the market without any transformation of its technical character. Producers (in this case, mostly women producing fabrics in the household) are simply encouraged to sell their output to commercial intermediaries in exchange for money. Over time, however, various changes to the production process are encouraged in order to increase output for the market and the process of real subsumption begins: first, producers are all brought together into a single production site, where they engage in work much as before and, later, specialized tools and machinery come to replace different segments of the work entirely. Though most commonly applied to historical examples such as this, a similar transition takes place for essentially any newly-marketised commodity. For example, we could identify a nearly identical trend within the social media economy, in which the 'artisanal' labour of organic and non-marketised content production by lone individuals is first marketised through simple incentives such as access to ad revenue until, gradually, these incentives transform content creation itself into an essentially industrial process involving vast teams of technical personnel.

ded periods of tenuous stasis. Nor are these divisions fixed. Even areas that once lay at the apex of global development, such as Detroit, can suddenly find themselves actively deconstructed by the very imperatives that once built them. The worlds that capital creates must themselves be dashed, ruined one after the other as the necrophage circles the earth, feasting on its children. Here, history offers a poor forecast of the future. Even while the slaughter and conquest of the worlds that once encircled this civilisation were necessary for its genesis, and though their plunder contributed to the speed of its ascent, *the perpetuation of such worlds is not and has never been necessary for its survival*. Capitalism can guarantee its own expanded reproduction entirely within its own social domain, though only through the obvious intensification of its metabolic draw on the non-human world.[35]

Today, in the absence of a periphery where capitalist society abuts a non-capitalist sphere, it has no other choice but to subsist through autosarcophagy, cannibalising the very worlds it once created in an endless ritual of efflorescent extermination. Crisis therefore becomes even more essential to the process of social reproduction than in the past, no longer simply serving as a periodic disruption but now a permanent feature of the system's very maintenance, disciplining the population, triggering key shifts in industrial geography, and inducing technical change through the threat of mass bankruptcy. At the larger scale, the process proceeds through the subsumption of both labour and various natural cycles, intricately interweaving machine systems with the daily life of the species and the geospheric systems of the planet. The expansion and deepening of this system is itself the necessary outcome of individual (political, economic, ecological, etc.) crises that are themselves specific historical manifestations of this underlying crisis of social reproduction. But, since the ultimate source of this endemic crisis is found in class antagonism – the con-

35 This point seems mundane but has been maybe the central dividing line within communist theory more broadly. Theories of crisis that emphasise the parasitic nature of capitalist 'plunder' to the exclusion of its internal capacity to increase value in the production process and thereby ensure intrinsic growth were nearly universal prior to Marx's intervention and have been reborn under the Marxist moniker every generation since. Often, this theory of an inherent extrinsic crisis triggered by capitalism's inability to ensure its own expanded reproduction has been adopted by thinkers who have made extremely useful political and/or theoretical contributions to the communist movement in other realms, which has unfortunately imbued this fundamental error with the glow of their sainthood. The classic debate on the topic focused on the function and consistency of Marx's 'reproduction schemes' in the drafts that became Volume II of *Capital*. Compare, for instance, Rosa Luxemburg's *The Accumulation of Capital* (and her sequel, 'An Anti-Critique'), to Henryk Grossman's 'Gold Production in the Reproduction Schema of Marx and Rosa Luxemburg' (in Grossman 2018, pp. 276–303).

tradictory inclusion of labour within capital – the conversion of the planetary population into a pool of exploitable labour-power only aggravates this deeper, permanent crisis condition, raising it to ever-larger scales that require more wide-ranging interventions and pose more catastrophic consequences if any of the many links in the chain of social reproduction break down.

Ultimately, though, the concept of subsumption only truly makes sense when it is understood not as a vague influence or impact on humanity or nature, per Camatte, but as the specific transformation of the technical processes of production that constitutes the social metabolism. While real subsumption results in immense technical productivity growth, allowing more commodities to be produced per unit of labour input, increased productivity is only an ancillary effect of each firm's attempt to turn a profit.[36] At the heart of the productivity gains induced by real subsumption is not actually increased technical efficiency but instead the specific increase in 'relative surplus value,' which allows more value to be siphoned from a given worker within a given period of time (i.e. without any lengthening of the working day) by introducing new labour-saving technologies that cheapen 'commodities in those industries which supply the instruments of labour and the material for labour, i.e. the physical elements of constant capital which are required for producing the means of subsistence.'[37] Thus cheapened, the portion of the day that an individual must work to produce the amount of value necessary for their own reproduction is reduced. But since the working day itself does not shrink, this means that the expanded surplus value created throughout the remainder of the day accrues to the firm. Cheapening the means of subsistence and thereby reducing the value of labour is then able to increase the value extracted (per unit of labour-power) in all lines of production (not just those supplying means of subsistence) because commodified labour is the source of all value. Any increase in relative surplus value therefore cascades through the entire planetary production complex.

Though labour, like nature, is ontologically prior to production and therefore constantly confounds its smooth conversion into labour-power with the obstinate friction of the worker's living body, there is ultimately nothing magical about human labour that makes it uniquely able to be transformed into the

36 This is extremely important, since it makes sense of myriad examples throughout history in which a more efficient technology or organisational arrangement was rejected because it was less amenable to the accumulation of value, despite being more productive in sheer material terms – as Malm (2015) exhaustively demonstrates in the competition between waterwheels and steam engines in early industrial Britain.

37 Marx 1976, p. 432.

source of this value. Certainly, our intellect and manual dexterity enable us to carry out work that is more complex than that which any other animal or even the most advanced machines would be capable of. But this has always been true, and yet *homo sapiens* has only recently become the value-producing ape. Nor can we account for this fact in the ability of humans to mobilise their intelligence to always scrounge for some extra, non-market subsistence enabling their survival even when they're not paid the 'full value' of their day's work. Various forms of 'super-exploitation' that push the wage below subsistence have been and continue to be common, even essential, features of the global division of labour. Similarly, there are always certain types of work – such as gendered reproductive labour, or the freely accessible amenities of nature produced by long-run ecological processes – that are systematically excluded from direct appraisal within the arithmetic of value. But super-exploitation, cheap natural inputs, and the unpaid reproductive power of the commons are not the source of value as such, regardless of whether they are inherent to capitalist production. Instead, labour can be transformed into the source of value for the simple reason that value is the form taken by the social relationships of domination that bridge the metabolic gap.

In other words, the 'value theory of labour' is not a theory of prices, nor of wealth 'wealth' or subjective 'values' in the colloquial sense, nor of mass and energy in the sense used by ecological economics. Though value shapes all of these, it is itself a purely social substance. As William Clare Roberts explains, the opening chapters of *Capital* 'contain … an account of the structure of human relations in commercial society. The concept of value they elaborate is, first and foremost, a tool for understanding the dominating form that these relations take.'[38] Human labour (once commodified, as labour-power) can be the only source of value because this social domination must, by definition, apply first to *people*. These relationships are then extended to the non-human world as a secondary expression of the domination of people by other people. Just as the church and its pyramid of priests require souls to save, so too do capital and its clerics require living bodies to labour for them. This also means that the subsumption of nature includes – arguably, begins with – the human population itself. Even while Camatte's notion of a 'total subsumption' that extends to all realms of life is a useless hyperbole, his more specific claim that capital has 'domesticated' humanity therefore contains an essential truth: a particular form of human population is both the prerequisite for capitalist social domination to take hold and is constantly reproduced by this domination once

38 Roberts 2017, p. 102.

established. In order to reproduce itself, capitalist society requires not simply a population, in the demographic sense, but a workforce attuned to the changing scale and character of the production process.

5 Labour in Capital

Simplifying somewhat, we can say that population, profit, and the planet itself serve as three central limits to accumulation – or, more accurately, ineradicable 'contradictions' that move and develop alongside capitalist society itself. However, although they are tightly interlocked, the three are not equal. We might conceive of declining profitability as something like the primary intrinsic limit to accumulation and the widening metabolic rift disrupting planetary systems as the primary extrinsic limit. Intuitively, it seems that the extrinsic limit of an 'ontologically prior' nature is the more fundamental of the two. This is essentially the position taken by Moore, who argues that the intensive process of exploitation within the formal property system ultimately relies on a quantitatively larger base of informal and unpriced appropriation, including the transfer of resources from the non-human world as well as the vast base of unpaid reproductive labour that serves as the basis of both racial and gendered divides: 'Every act of exploitation (of commodified labour-power) … depends on an even greater act of appropriation (of unpaid work/energy) … Value does not work unless most *work* is not valued.'[39] Contemporary variants of the parasite fable are even more apparent in the work of contemporary 'social reproduction' thinkers such as Nancy Fraser, who describes a 'cannibal capitalism,' in which the 'non-economized wealth of everyone else' is served 'on a platter to the corporate classes' who are then invited 'to make a meal of our creative capacities and of the earth that sustains us – with no obligation to replenish what they consume or repair what they damage.' And her image of the parasite is definitively necrotrophic: 'Like the ouroboros that eats its own tail capitalist society is primed to devour its own substance.'[40]

Like Moore, Fraser stresses that capitalism is an expansive social system – spanning production and reproduction, exploitation and expropriation, the technical and the 'natural,' etc. – rather than a narrowly economic one. Nonetheless, she also characterizes this economic sphere as an essentially extrinsic form of glutinous excess that is driven to 'cannibalise' the non-market dynam-

39 Moore 2015, p. 54.
40 Fraser 2022, p. xv.

ics that serve as its necessary ground. Moore offers a similar narrative, but one that also offers a more complex theory of value in which the very 'natural' ground underlying accumulation is itself locked in a dialectical process of co-production with capital.[41] Echoing Fraser, he explains how 'the history of capitalism flows through islands of commodity production, developing within oceans of unpaid work/energy.'[42] Similarly, he claims that the growth of the former (the sphere of exploitation) at the expense of the latter (the sphere of appropriation, in Moore's terms, or expropriation, in Fraser's) will ultimately force capitalist society into terminal crisis. Any intensive growth via exploitation (i.e., siphoning more value out of a given input of labour-time) is presumed to necessarily entail an even larger extensive base of appropriation to support it. Exploitation is, in other words, simply the disguising of extensive growth elsewhere in the costume of local productivity growth. Despite the complex co-constitution of the market and non-market spheres, then, this is essentially the same narrative of capital as parasite or 'cannibal' invoked by Fraser. And, even though Moore continually stresses that this appropriative base can be – in fact, has continually been – reinvented through the creation of 'new natures' and the advance into new commodity frontiers, he also argues that the final enclosure of the planet now poses intractable limits to this process. The result is a theory of crisis that is essentially just a (questionable) forecast of some forthcoming peak in the quantity of available energy, resources, or extra-market work available for the social system to appropriate. As Fraser argues, the beast is devouring its own substance faster than it can be replenished.

However, Moore and Fraser's Manichean opposition between exploitation and appropriation/expropriation fails to adequately grasp the dialectical overcoming of these two spheres in the form of commodified labour itself. Ultimately, both the intrinsic limits of profitability and extrinsic environmental limits tend to serve not as absolute constraints on the social system so much as

41 In part, the distinction between the two authors may have more to do with audience and writing style, as Fraser tends to write in a 'pop socialism' register and therefore adapts her writing to already-mainstream progressive sentiments, making liberal use of terms such as 'neoliberalism' and framing the entirety of her political critique in essentially moral terms, as a critique of gluttony, matching the established discourse of 'corporate greed.' It is therefore difficult to distinguish her more refined theoretical positions from these essentially propagandistic ones. Moore, on the other hand, writes in a more insular register, first staking out his position within 2010s philosophical debates and often adopting inelegant neologisms clearly not well-designed for general consumption. Nonetheless, this at least allows Moore's core argument to come through more clearly.

42 Moore 2016, p. 54.

developmental hurdles overcome through new rounds of intensive subsumption. As the source of value, labour-power exerts both an intrinsic force in the form of class conflict – battles over the terms of subsistence, the cost of the wage, or the impact of the production process on the human body – and poses an extrinsic constraint in the sense that, as a transmutation of general human intellectual and bodily capacities, labour-power is a peculiar commodity that cannot be produced directly by capitalist means. Thus, it poses the most intractable contradiction: labour must simultaneously be a commodity and a non-commodity.

The more general social implications should be clear. As both Fraser and Moore stress, this contradiction will always induce the formation of divides within the proletariat, the most salient of which is the 'gendered' divide that separates out productive from reproductive tasks. Feminist thinker Leopoldina Fortunati provides the classical formulation of the argument:

> The woman, under capitalism, reproduces the waged male worker; yet she is not waged herself. She is instead a 'natural force of social labour.' The 'free' male waged worker thus corresponds to the 'free' female non-waged houseworker, a profound formal difference which is reflected in the equally profound inequalities of their mutual relationships under capitalism, and their unequal status within the capitalist system, which arises at the point in which capital transforms the male/female relationship from an exchange of living labour into a formal relation of production between them.[43]

But the problem does not stop at the border erected between 'male' and 'female,' which has itself been locally broken down in the course of development – with the mass entry of women into the white collar workforce in the wealthy countries and into the blue collar workforce in nearly all of the world's major manufacturing centres – and simultaneously redoubled, as reproductive

43 Fortunati 1995, p. 31. Maya Gonzalez clarifies the importance of Fortunati's contribution: 'These new concepts of indirectly waged work and the houseworker open up the sphere of housework and prostitution as a capitalist sphere within the circuit of reproduction. Within this sphere there is "the co-existence of the two forms of labor power," productive and reproductive, whose bearers engage primarily in two different kinds of work relations – formal and informal (or more often marriage), in addition to directly waged exchange: "the individual as capacity for production confronts capital," while "in the second case, the individual as capacity for reproduction is confronted not by capital, but by the individual him/herself as [productive] labor-power."' (Maya Gonzalez, "The Gendered Circuit: Reading the Arcane of Reproduction", *Viewpoint*, 28 September 2013.)

work has been transmitted down the imperial hierarchy to even more specialised populations of migrant domestic workers and dense networks of unpaid care work in the poorest countries. And, as this marketization suggests, the problem of population (the production of a workforce adequate for accumulation) is not, in fact, an issue of simply exhausting the unpaid font of care work. The gender divide is produced by and remains ancillary to a more foundational limit of social reproduction.

The ongoing conversion of the innate human capacity to do useful work into the commodity called labour-power spans the intrinsic and extrinsic spheres and ultimately forms something like the fundamental limit to accumulation underlying all others. Uno Kōzō, one of the few Marxist thinkers to attempt to think through the intricate connection between population, profit and crisis, is worth quoting at length:

> While capitalism transforms the entirety of society into a commodity economy by commodifying labour power and by mediating, through the commodity form, the relationship between capitalists and workers as the fundamental relationship of society, there now emerges, from the depths of capitalist society, a point that is left over by capitalism, a point where it is unable to completely transform society into a commodity economy. This point exposes how the commodity form cannot serve as the absolute form for human society. No matter how much human beings are regarded, commodity-economically, as a human resource, workers are human beings, not resources. They are not things, nor can they be produced as mere things. Workers cannot be produced as things by capital itself either, and while workers may be viewed as a resource similar to nature, unlike nature they are not given externally, from the outside. Workers are rather reproduced annually by the means of consumption as products of labour, which, in a capitalist society, are products of capital … the surplus or lack of a working population itself comes to appear as an internal factor to the development of capitalist production, constituting a contradiction immanent to capitalism. Not simply a contradiction between things, it is a contradiction born out of the form itself that turns human beings into things.[44]

Similarly, critical theorist Werner Bonefeld offers a concise summary of the same basic problem: 'a crisis of capitalist accumulation asserts the presence of

44 Uno 2022, p. 87.

labour in and against capital.'[45] In short, the troublesome inclusion of labour within the concept of capital poses recurrent threats to the reproduction of the labour-capital relationship itself.

Historically, the commodification of labour is first made possible when a population's mode of subsistence becomes increasingly dominated by market pressures. This process is not initiated by, but instead reaches its definitive completion in, the act of enclosure – which is defined not simply as a moment of violence and plunder but instead as the forceful establishment of the property system itself. Once dispossessed, the populations newly 'freed' from the land must find some source of money to survive, thereby submitting themselves to both direct domination within the factory as well as the more general and impersonal domination of the market. Meanwhile, real subsumption also indirectly induces demographic changes as advances in medical knowledge and agricultural technologies contribute to reduce average rates of mortality, morbidity, and malnutrition, even while birth rates initially remain elevated. Economic historian Aaron Benanav calls this latter process 'demographic proletarianization,' in which 'demographic growth undermined customary modes of inter-generational land transfer in the countryside: children either did not inherit land or inherited plots too small to support traditional forms of life' while also 'causing a rapid, and in the end, much more consequential increase in the number of urban-dwellers, who depend on labour markets to survive.'[46] Tracking Fraser and Moore, we might also think of these early stages of proletarianisation as an era when the 'gender dividend' is at its peak, since the unpaid reproductive labour performed mostly by women (but also by semi-peasant smallholders, in many cases) still underpins a not-yet-marketized care economy tasked with producing the workforce itself. In this way, demographic booms that accompanied agricultural and medical modernisation helped to universalise market dependence and thereby acted as a form of soft enclosure accompanying more overt forms of dispossession.

Once commodified, human capacities then become subject to the transformative pressure of real subsumption in much the same fashion as the technical infrastructure of the planetary factory. In order to effectively feed labour-power into the circuits of valorisation, the population must be made to submit to the necessary time discipline of work and be in possession of the correct range of concrete skills required within the process of production. In other

45 Bonefeld 1991a, p. 27.
46 Benanav 2015, p. 34.

words, the physiological capacities of the human species must be sculpted through the training of muscle memory, the implantation of particular forms of knowledge, and the more general cultivation of public health, public order, etc. Whether you recognise it or not, you feel the disciplining pressure of this process every day. It is the pain in your feet from a day of standing at the cash register, the pain in your back from sitting through corporate meetings, the pain in your joints from hours of repeated labour. But it is also something more than this, since the process reshapes human subjectivity in the most deep-seated ways, ensuring that our own self-image – indeed, our very idea of individuality – has coevolved with the social imperatives of capitalist production. It is not just the disciplining of the body, then, but the sustenance of that body, the knowledge cultivated within its brain, and even the technologies of care that maintain it. While this process is ultimately aimed at preparing people for the worksite, it cascades well beyond the factory gates, producing a 'social question' that also absorbs into itself a variety of local cultural contradictions carrying their own moral weight. Thus arise the specific social reproductive responsibilities apportioned to families, customary authorities, and, increasingly, modern states – foremost among them the maintenance of social discipline, the selective cultivation of public health, and the uneven distribution of education.

Altogether, the sculpting of the population both in and outside of the labour process forms a sort of 'collective worker' endowed with a 'productive subjectivity' or 'social brain' that, in aggregate, expresses both the species' theoretical understanding of the natural world and our practical capacity to transform it. As in Xu's poems, however, this collective worker only emerges in monstrous fusion with the machine systems that compose capital's built environment. But here we must stress, contra Camatte, that the domesticating imperatives of the higher-order emergent social system visible in that encircling environment are still fundamentally dependent on and, in fact, coevolve with the subjectivity of its lower-order components. According to Marx, these machine systems are therefore themselves

> natural material transformed into the organs of the human will over nature, or of human participation in nature. They are organs of the human brain, created by the human hand; the power of knowledge, objectified. The development of fixed capital indicates to what degree general social knowledge has become a direct force of production, and to what degree, hence, the conditions of the process of social life itself have come under the control of the *general intellect* and been transformed in accordance with it; to what degree the powers of social production have been pro-

> duced, not only in the form of knowledge, but also as immediate organs of social practice, of the real life process.[47]

In the latter twentieth century, it became common to quote the above passage (from the so-called 'Fragment on Machines' in the *Grundrisse*) as evidence for a flourishing of the general intellect in a 'post-Fordist' capitalism enabled by new forms of 'immaterial labour' visible in 'networks of information, communication, and cooperation' such as the internet. At root, these accounts merely dressed up older forms of Promethean economic determinism in a new utopian costume, conflating structure and subject in arguing that the realisation of the general intellect by capitalist development would inherently generate a new form of collective subjectivity that spanned class fractions and thereby made traditional notions of class struggle obsolete.[48]

But the image given in the 'Fragment on Machines' is not the full picture. In fact, Marx himself chose never to publish this fragment of his earlier draft, nor to incorporate it into the finished draft of Volume 1.[49] More than this, he instead chose to emphasise the exact opposite dimension of productive subjectivity in the version of *Capital* he prepared for publication, stressing how the growth of this 'general intellect' only comes about through the fragmentation of knowledge and technical skill in the division of labour:

> After the various operations [performed in the labour process] have been separated, made independent and isolated, the workers are divided, clas-

47 Marx 1973, p. 706.

48 This view was extremely widespread in both Marxist and various 'post-Marxist' currents in both the academic and activist worlds. Its most consistent theorisation is found in the work of post-autonomist thinkers like Antonio Negri, Michael Hardt, and Paulo Virno, who refer to this new form of collective subjectivity as 'the multitude.' The quoted terms in the previous sentence are repeated regularly in the work of all three authors.

49 This is only one dimension of a much larger obsession in latter-twentieth-century Marxist circles with various newly published or translated drafts, notes, and fragments from Marx's work which became available from roughly the 1960s onward, when the Marx-Engels-Gesamtausgabe (MEGA) project collecting the entire works of Marx and Engels was reinitiated after the death of Stalin. The widespread publication and translation of drafts like the *Grundrisse* and the *Economic and Philosophic Manuscripts* led to renewed 'humanist' and 'philosophical' interpretations of Marx which, in response to the then-established Soviet 'orthodoxy,' tended to overcorrect in the opposite direction. The *Grundrisse*, for example, became a foundational text for the post-autonomist currents mentioned in the previous footnote, essentially supplanting *Capital*. These accounts rarely offered any explanation for why Marx himself never sought the publication or promotion of these supposedly essential elements of his thought or why he instead emphasised quite different dimensions in his final work intended for a general audience.

> sified and grouped according to their predominant qualities. If their natural endowments are the foundation on which the division of labour is built up, manufacture, once introduced, develops in them new powers that are by nature fitted only for limited and special functions. The collective worker now possesses all the qualities necessary for production in an equal degree of excellence, and expends them in the most economical way by exclusively employing all his organs, individualised in particular workers or groups of workers, in performing their special functions. The one-sidedness and even the deficiencies of the specialised individual worker become perfections when he is part of the collective worker. The habit of doing only one thing converts him into an organ which operates with the certainty of a force of nature, while his connection with the whole mechanism compels him to work with the regularity of a machine.[50]

In other words, this productive subjectivity is only unified through its very separation. But this also implies that technical competencies will be unevenly distributed throughout the population and across physical space, since different occupations require access to different breadths of this total social knowledge. The proletariat is not defined by its ability to embody some sort of universal industrial consciousness, then, but instead by its daily disinheritance. The general intellect of capitalist society thrives only in its slaughter. Rather than the fire-bringer, we find the tortured trickster, the collective worker chained to stone and disembowelled for eternity.

6 The Teutonic Castle

This continual shattering of the social brain also means that certain fragments of the collective worker have access to a much wider scope of the general intellect, while others find their productive subjectivity narrowed to the point of mutilation.[51] In other words, the uneven unfolding of relative surplus value production across the technical complex also results in the necessary zoning of

50 Marx 1976, pp. 468–9.

51 Terms such as the 'general intellect' and 'productive subjectivity' are not amorphous expressions gesturing toward something like a great library of human knowledge recorded in the abstract, nor are they form of mental intelligence possessed at the individual level (i.e., as so-called 'human capital'). Rather than either collective consciousness or knowledge gathered in the brain of a single person, these concepts refer solely to a type of

productive subjectivity. Though the details of this division of labour ultimately take on a baroque complexity, the overall pattern is essentially polar. In the terms used by insurrectionary anarchist Alfredo Bonanno, the central division is that which arises between an included minority inside the 'Teutonic castle' where productive knowledge is preserved and an excluded majority beyond the castle walls who are reduced to simply 'pushing buttons.' In the extreme, this generates a constitutive fissure at the very centre of the social brain that drives against any notion of solidarity premised on the transitive equation of structural position and revolutionary consciousness: 'the *included* of tomorrow will not feel himself humanly and fraternally similar to the *excluded* but will see him as something *other*. The *excluded* of tomorrow will be outside the Teutonic castle and will not see the *included* as his possible post-revolutionary brother of tomorrow.'[52]

And yet the basis of this division is not absolute immiseration but instead the relative proliferation of want in the midst of general plenty. Hyper-productive industries enable the creation of a vast pool of social wealth that, even after the bulk is siphoned into the coffers of the capitalist class, still constitutes an immense cornucopia of commodities that is then apportioned to included and excluded alike. As Clarke argues, development exhibits both

> the tendency to increase the productivity of labour to an extent never before seen [and] on the other hand, the tendency to increase productivity not for the benefit of, but at the expense of, the mass of the population. Thus the increased productivity of labour is not expressed in a growing abundance of goods for the mass of the population nor in a reduction in the burden of work. Instead it is expressed in a growing accumulation of capital at one pole of society and growing poverty (relative if not absolute) at the other … The more rapid is 'progress' the more rapidly is work dehumanised and workers degraded, exploited and cast aside.[53]

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working expertise embodied at the collective level in social practice – which requires bodily interaction with the infrastructures into which portions of this knowledge are encoded as well as direct participation in the inherently collective coordination of complex material flows. Though individuals may help to express productive subjectivity at the collective level through their everyday activity, they themselves have no 'productive subjectivity' floating around their minds, only specific forms of abstract productive knowledge and individual experience.

52 Bonanno 1988, p. 22.

53 Clarke 1991, pp. 119–20.

The extreme inequity in the apportionment of this abundance, which loosely maps onto the zoning of productive subjectivity, certainly still produces extreme forms of abjection and deprivation. But as Roberts argues:

> Beyond the factory gates, the accumulation of capital leads, in Marx's story, not so much to the absolute impoverishment of a humanity stripped bare – proletarians with nothing left to lose but their chains – as to a world in which the spectres of un- and underemployment, precariousness, and obsolescence, divide the proletariat against itself in innumerable ways, and in which social impoverishment – being cut off from social wealth – is the rule.[54]

Instead of a flourishing general intellect expressing a singular subjectivity, then, we must instead speak of different degrees of productive subjectivity collectively expressed by different segments of the population based first and foremost on their practical knowledge of the production process as enacted in everyday work within their given field and, to a lesser extent, on their general level of schooling or other forms of abstract but largely unapplied training.

The highest degree of productive subjectivity is manifested in that 'part of the collective labourer responsible for the advance in the conscious control of the movement of natural forces (that is, science) and its technological applications in the directly social organisation of the immediate production process.'[55] These are also the workers who, due to their unique position within the division of labour, are allotted a relatively higher degree of autonomy over the concrete activities of their daily work and/or a more expansive grasp of the entire production process. In occupational terms, this would obviously include scientists, engineers, and operators of particularly complex industrial systems. But it can also describe fractions of the class who have, for whatever reason (often only through long histories of struggle), retained high degrees of localised knowledge and artisanal skill, which is then combined with externally imposed (i.e. 'modern') forms of industrial training in the midst of their more general proletarianisation – as visible, for example, in the combination of controlled burns with traditional silvicultural practices among indigenous peoples across much of the Americas, which is today helping to revolutionise the both science and institutional practice of forest management.

54 Roberts 2016, p. 184.

55 Charnock and Starosta 2016, pp. 6–7.

Though such divisions necessarily take on a geographic character, they are defined by a technical zoning more than a spatial one. Thus, different strata of productive subjectivity must always be woven together within any given firm, which acts as the practical integrator of this division – partially in-house and partially in the process of coordinating with other firms via the market. At the planetary scale, the general spatial pattern of productive subjectivity visible in these supply chains both maps onto imperial structures of power via the international division of labour and is reproduced at descending scales within this division. Again, we find that the 'Teutonic castle' is a fractal labyrinth, branching out across the planet in a maze of cloister, wall, and graveyard. But even though the upper stratum of workers sheltered in the gardens and courtyards of the palace has access to a far greater breadth of the general intellect, the collective mobilisation of even the most comprehensive knowledge of production still only occurs in partial ways, via the private appropriation of these workers' scientific labour within the firm, across the market, and through specialized institutions (universities, state research agencies, etc.) designed to better channel provisionally public resources in service of private accumulation.

Both firm and market straddle the castle wall and extend far into the graveyards beyond, where the real subsumption of the labour process 'tends to degrade the subjectivity of those workers that acquire and exercise their increasingly simpler manual or experienced-based productive attributes in the direct process of production.'[56] Though this degradation takes on various grades and intensities, it is fundamentally defined by exclusion from productive knowledge and a low degree of autonomy in (or even outside of) the workplace. Similarly, since real subsumption leads to increased mechanisation and the shedding of human labour from the production process, the

> multiplication of the surplus population relative to the needs of the accumulation process … represents the most extreme case of material mutilation of the productive attributes of the working class resulting from capital accumulation, that is, not simply their degradation but their outright non-reproduction.[57]

The lowest of these strata may even be systematically starved of access to education or legal labour markets entirely. While this divide is inherently racial – not in the sense that it naturally follows ethnic categories, but instead because

56 Ibid.
57 Ibid.

the systematic exposure of any population to such conditions produces race as we know it – the surplus population is far broader than the many racial divides branching through it at any given moment and is itself intricately subdivided both within and between different spheres of accumulation. Thus, the surplus population as such should not simply be equated with extreme social abjection, as it also includes substantial portions of the workforce within the wealthiest countries, sustained by large welfare states or the proliferation of unproductive occupations.[58]

At the same time, this process of degradation is itself only one aspect of a more expansive form of domestication in which productive knowledge is not simply eroded but also reconstituted in a form more amenable to the ever-changing conditions of accumulation. On the one hand, real subsumption can certainly be characterised as a process of deskilling via mechanisation, which effectively codifies a form of productive knowledge in machine systems such that this knowledge is thereafter only fully comprehensible to individual specialists with a relatively high level of training. On the other, the process also involves the widespread reskilling of the population on a new basis: First, some of those employed in the immediate process of production must be trained to operate and maintain the very machines that have led to deskilling in the sector, thereby forming a lower stratum of technical personnel that sits somewhere between the fully 'degraded' subjectivity of unskilled workers and the heightened subjectivity of engineers or scientists. Second, even workers performing monotonous tasks that require little in the way of manual or intellectual technique must nonetheless be familiar with entirely new universal skillsets that are only accessible through 'the general process of education and socialization that precedes [their] actual application in the production process.'[59] These include 'familiarity with computers and flexibility or individual initiative in problem-solving or decision-making,' not to men-

58 The term 'surplus population' has recently become a popular way to simply refer to all the world's worst-off groups: slum-dwellers who have hardly been incorporated into waged labour in the first place, the long-term unemployed, the homeless, slave labourers building skyscrapers in Dubai, prisoners and refugees, etc. But the category is both more specific and much broader than this, referring solely to the condition of superfluity relative to the production of value. For many individuals, this surplus condition is only partial, appearing in the form not of outright unemployment but instead of underemployment or of extremely unsteady income derived from 'self-employment' in the informal sector. Meanwhile, depending on their occupation, even workers in extremely abject conditions, such as slave labourers, may in fact not be 'surplus' to production at all, but instead central to it.

59 Charnock and Starosta 2016, p. 8.

tion even more rudimentary skills like literacy and numeracy.[60] While there are certainly jobs that require a lower degree of these 'soft or generic skills,' such skills nonetheless set the minimum standards for labour in any given region.[61]

Altogether, the need to cultivate these new skillsets then induces larger-scale reforms to the general machinery of social reproduction. Thus, alongside the degradation of productive knowledge comes an expansion of reproductive capacities, visible in the emergence of fundamentally unproductive and yet entirely necessary sectors devoted to things like education, healthcare, utilities, and environmental protection. Over time, the growing scale and complexity of production requires increasingly general organs external to the firm (and often only partially marketised) to prepare and maintain the basic socio-ecological substrate of skillsets necessary for the further development and branching of the division of labour. Since abjection in the midst of material wealth represents the negative form of capitalism's fundamental contradiction, expressed as the degradation of productive subjectivity, it is tempting to then see in the proliferation of these new reproductive skillsets something like the positive restoration of knowledge through its generalisation across the social brain in new integrative institutions. However, while there is a kernel of truth to this, any 'reproductive subjectivity' generated by these material forces is only potential, not given. Although these reproductive activities generate their own ideological image of themselves as universal social services, they remain in every sense subdivided by and subordinated to the property system. More than this, many of these reproductive tasks are deplorable activities that contain no emancipatory potential whatsoever, including the myriad administrative and disciplinary tasks delegated to the state which, through these very activities, expands into new domains, refines its capacities, and metastasises into complex and often terrifying new forms of technocratic rule.

7 Structure and Subject

Marx's prediction that a new form of revolutionary subjectivity would gestate within the proletariat was made when the proletariat itself constituted a small share of the overall population. At the time, industrial workers represented both a growing portion of the workforce and a prototypical example of

60 Ibid.
61 Ibid.

proletarian existence.[62] While industrial workers are no longer a growing share of the global proletariat, the former point – that the proletariat will serve as the necessary gestation chamber for revolutionary subjectivity – has in fact become so obvious as to be banal. So long as revolution remains a possibility, Marx's prophecy will be proven correct by simple tautology: since the vast majority of the global population has now been proletarianised (and since revolutions only emerge from the activity of masses of people), it is today a given that communism must arise from within the proletariat if it is to arise at all. The question instead becomes: where within the social brain will this revolutionary impulse first spark and spread, and how might this occur?

This is where the figure of the industrial worker returns, as alleged disproof of the supposed prophecy. Sociologist Beverly Silver recites the myth with precision:

> Marx expected that proletarianization processes would produce an increasingly homogenous working class over time, with converging experience, interests, and consciousness, thus laying the basis for unified national (and international) labour movements.[63]

Putting aside the inconvenient fact that Marx himself often articulates the exact opposite position to that cited by Silver, the historical failure of the proletariat to compose itself into a homogenous industrial demographic with 'converging experience, interests, and consciousness' then seems to invalidate the broader claim that revolutionary subjectivity must, of necessity, emerge from this class.[64] But this disproof relies on a vulgarisation of the original question.

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62 Marx's basic point was essentially polemical, argued against those who retained faith in the revolutionary potential of artisanal producers or the petit bourgeoisie. Though prophetic, this idea was – at least in its own era – soon called into question by both the capitulation of industrial workers to traitorous national compacts (beginning with social democracy and ending with fascism) and by the rise of new, world-shaking peasant revolutions within which workers were resigned to an important but essentially supporting role.

63 Silver 2003, p. 22.

64 Marx offers a far more nuanced understanding of how revolutionary subjectivity might develop than that attributed to him by both critics and self-professed proponents. It is therefore not at all difficult to find entries in which he claims exactly the opposite of the position Silver attributes to him, as in the first volume of *Capital*: '… the extraordinary increase in the productivity of large-scale industry, accompanied as it is by a more intensive and more extensive exploitation of labour-power in all other spheres of production, permits a larger and larger part of the working class to be employed unproductively. Hence it is possible to reproduce the ancient domestic slaves, on a constantly expanding scale, under the name of a servant class …' (p. 574). Nor does expanding industry lead to

Rather than the issue of agency, we instead find a simple, schematic inquiry: which group of workers within the global division of labour will, due to their privileged structural position, serve to represent the consciousness of the class as a whole?

In the classical myth invoked by Silver, this revolutionary subject is supposed to have at its core the fraction of the proletariat formally employed in the mega-factories of mass production. Several different justifications were here usually collapsed into this one concept: such workers occupied a structural position within the layout of social production that gave them the ability to shut down huge portions of the economy at will; their exposure to modern methods of scientific machinofacture allowed such workers to more directly perceive the social character of production, predisposing them toward socialist politics; their familiarity with the production process would allow them to administer their own factories for the common good during and after the revolutionary seizure of power, etc. When the industrial worker then failed to play its destined role, the basic logic equating structural position to political potential was nonetheless retained by passing the baton to any other group that seemed capable of fulfilling this role. The victory of the Chinese revolution, followed by anti-colonial uprisings across the periphery and the very beginnings of deindustrialisation in the wealthy countries (defined by the uneven distribution of the ensuing unemployment along racial lines) would see the peasantry and lumpenproletariat forced to fit the role.[65]

In every one of these formulations, the basic equation nonetheless remained the same: There exists a particular demographic defined by its structural posi-

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homogenisation, but instead its exact opposite: 'By constantly turning workers into "supernumeraries", large-scale industry, in all countries where it has taken root, spurs on rapid increases in emigration and the colonisation of foreign lands, which are thereby converted into settlements for growing the raw material of the mother country … A new and international division of labour springs up, one suited to the requirements of the main industrial countries, and it converts one part of the globe into a chiefly agricultural field of production for supplying the other part, which remains a pre-eminently industrial field.' (pp. 579–80)

65 As summarised by Eldridge Cleaver, an early leader of the Black Panther Party: 'Fanon unearthed the category of the Lumpenproletariat and began to deal with it, recognizing that vast majorities of the colonised people fall into that category … After studying Fanon, Huey P. Newton and Bobby Seale began to apply his analysis of colonised people to Black people in the United States … Armed with this ideological perspective and method, Huey transformed the Black lumpenproletariat from the forgotten people at the bottom of society into the vanguard of the proletariat.' (Cleaver, Eldridge 1969 'On the Ideology of the Black Panther Party (Part 1)', San Francisco: Ministry of Information, Black Panther Party, p. 2; p. 6.)

tion relative to production (including groups that lie 'outside' of it), that acts as the primary subjective force of revolutionary struggle *because of this structural position*. As it grows conscious of its historic mission, it produces an intentional political vanguard capable of acting as the tip of the spear thrust against the capitalist world with the heft of the class behind it. The basic logic here is described by political philosopher Rodrigo Nunes one of 'transitivity,' which links 'the positions people occupy within social structure (class, age, race, gender, etc.) and the ideas that they have …' More specifically, Nunes argues that the classical myth of transitive revolutionary subjectivity, whether attributed to industrial workers, the lumpen, or peoples lying beyond the orbit of capitalist society entirely, relied not on some loose, probabilistic link between social position and agency but instead on 'the idea that there is a deterministic connection between social structure and revolutionary subjectivity in the sense that some groups, by virtue of their structural position, are both *endowed with a unique capacity to transform that structure* and *determined to become politically conscious and active*.'[66] In such a view, past failures in revolutionary organization can therefore be attributed backward to failures of adequate structural analysis. If former socialists bet on the wrong horse, this was merely due to accidents of circumstance or a premature surety, now clear in retrospect.

Even if this approach might have had propagandistic appeal and therefore served a practical function, it ultimately sidesteps the question of subjectivity as such by conflating the social 'place of oppression' with the very act of stepping beyond this assigned place in the sociological structure. And this failure has resounding political implications. As political philosopher Michael Neocosmos notes: 'It is the inability to grasp the subversion of place within revolts, rebellions, riots and revolutions that lies at the core of the failure to understand the politics of emancipation, a procedure typical of the sociology of social movements, for example.'[67] Assuming that the productive forces will inevitably generate a readymade revolutionary demographic through the simple mechanism of their own historical development merely buries questions of agency under the crushing force of a serendipitous determinism. The real question is the far more elusive one raised in the midst of every living struggle and periodically codified in the proper names of revolutionary leaders such as Lenin or Mao, or simply in the geographic placenames where a collective, revolutionary agency was momentarily visible, such as Paris or Gwangju: organization as a

66 Nunes 2021. pp. 97–98. Italics in original.
67 Neocosmos 2016. p. xxiv.

practical question posed in the midst of insurrection.[68] And it is not a question that can ultimately be answered with any specificity *in theory* because, as these historical examples clearly demonstrate, it is not a question of theory at all but instead a pragmatic one, solvable only within the particular confluence of historically-accreted conflicts that poses it as a question in the first place.

In short, there exists no deterministic or even direct relationship between the vast megastructures of capitalism and the fomentation of a revolutionary subject somewhere deep within the catacombs of fixed capital etched into the Earth. While the gargantuan social forces that shape the planet can be grasped in the abstract through theoretical analysis – and while this process can provide a better understanding of the terrain, prevailing trends, the distribution of power, and the minimal conditions for dismantling this world to those engaged in the actual practice of making revolution – revolutionary agency always has a singular and contingent character, composed of functional organs formed in a specific context and only provisionally useful beyond it. Studying histories of struggle therefore helps to illustrate the pragmatic process whereby this agency is formed within a given terrain, perhaps demonstrating (across many cases) a certain probabilistic link between structural position and political sentiment, but rarely one that can be generalized across time and place. In other words, although the material development of the productive forces may end up predisposing certain segments of the proletariat toward particularly incendiary forms of struggle – which, in their negativity, open immanent infinities at the heart of a previously enclosed historical situation that then potentialise new forms of emancipatory politics – there is no strict homology between a demographic group's structural position within the productive apparatus and its propensity to gain any sort of revolutionary consciousness. In fact, if revolutionary history is any example, openness to revolutionary sentiment is often due to hyper-local factors that are difficult to generalize. The question therefore becomes how, exactly, the probabilistic relationship between structure and struggle relates to the construction of a revolutionary subject in and through these specific conflicts via the generation of self-reflexive political agents capable of intervening back into the very process that produced them.

But social position doesn't simply dissipate in the heat of rebellion. The difficulty here is in balancing two opposed but equally obvious points: people

68 These names come to represent a certain living practice of revolutionary organization that carries its own legitimacy regardless of any theoretical shortcomings and is, for the same reason, subject to a process of ossification – in part because its very vitality in practice induces waves of increasingly dogmatic mimicry-from-a-distance, and in part because its own lifeforce is exhausted in the course of history.

are induced to engage in struggles that relate, in some fashion, to their day-to-day experience of domination, thereby expressing their own sociological position; and they are also agents capable of thought and action, allowing them to act in excess of these pre-existing interests. In this regard, the all-too-common equation between one's sociological identity (however 'intersectional') and one's political predilections tends to serve a conservative function, in practice. According to Neocosmos, rather than expressing a revolutionary position, this transitive reduction of struggle to the mere expression of delimited identities is in fact a form of 'state politics,' which 'concern the representation of interests (by parties, interest groups, social movements, NGOs, etc.) and the management of such interests, thus restricting them to controllable limits.'[69] By contrast, an emancipatory politics is driven by 'contradictions between subjectivities as expression of place and their excess …' Erring solely on the side of social position produces a conservative determinism in which the only legitimate demands are those already pre-determined by existing sociological divisions, requiring accurate representation by socially conscious institutions and 'grassroots' representatives drawn from matching identity-groups. And yet erring solely on the side of subjectivity also produces a vacuous voluntarism incapable of grasping the obvious, if probabilistic, link between social position and political agency and the fact that conflicts over subsistence will always form the grounds for emancipatory projects, even as they limit them – and this voluntarism, ironically, tends to itself be the conservative, 'state-political' expression of particular and relatively predicable social fractions: students, déclassé professionals, slumming artists, etc. The two errors are, in fact, mutually constitutive insofar as the spectre of voluntarism is always invoked by the determinist to implement the administrative suppression of an active rebellion, while the spectre of determinism is always invoked by the voluntarist as an excuse to ignore the basic substrate of subsistence demands and concrete livelihood concerns from which the rebellion always emerges.

By contrast, partisan political subjectivity aiming at emancipatory ends embraces the tension inherent in transitivity. The emancipatory project recognizes first that 'all rebellion is socially located.' Rebellions therefore invoke identities that already exist within the overarching sociological structure, each of which carries with it a specific experience of social domination and, thereby, a particular collection of subsistence struggles related to that position, which can usually be boiled down to a set of minimal 'interests' or 'demands.' This also means that certain groups, due to the excess of oppression they suffer within

69 Neocosmos 2016, p. 19.

the social system, may have broader 'interests' that more easily gesture toward emancipatory ends, rather than insular ones. But rebellions can also take on a universally emancipatory character that 'consciously outstrips its location' entirely, pushing even beyond the bounds of the broadest possible 'demands' that arise from structural position alone. This outstripping of location is visible in a unique form of what Neocosmos calls 'excessive thought,' in which participants refuse *in practice* to be reduced to their identities – even while they may still continue to advocate for those initial, delimited interests – and instead express an extensive fidelity to the political potential opened by the struggle itself. The history of insurrection demonstrates this again and again as initial, minimal sets of demands posed in the early days of a struggle are quickly outstripped by the mass momentum of the uprising itself, such that even the capitulation of authorities to these demands fails to quell the rebellion. And yet these structural positions and their related subsistence demands never quite disappear. They are instead buoyed by the larger emancipatory current, existing in tension with one another and even with the rebellion as a whole. As a result: 'It is only through gradually resolving these contradictions on a continuous basis that a process of politicization and emancipation can be sustained.'[70] And this is precisely what 'state politics' and the logic of the 'social movement' deny by trying to flatten struggle into the mere expression of pre-existing sociological divides.

At the larger scale, this then implies that 'there can be no subject of history (the proletariat, the nation, the multitudes, etc.)' lying in wait within the division of labour. There instead only exists 'a subject of politics [which] results from a process of conscious political self-creation or affirmation – a process of subjectivation.'[71] In other words, there exists a disjunction between productive subjectivity and revolutionary subjectivity, such that the latter is in no way a given or 'natural' expression of the former. This also means that, contra the mythos of a communist consciousness lying in wait within some privileged fraction of the proletariat, the actual course of political struggle is far more contingent and must, of necessity, invent practical methods to span a heterogenous class rather than expecting some forthcoming homogenisation of interests. And this seems to match the course of the early labour movement, within which Marx's own work intervened and which laid both the organisational and ideological groundwork for the major revolutions of the twentieth century and the related wave of industrial organising that peaked in the 1930s.

70 Neocosmos 2016, p. xxv.
71 Neocosmos 2016, p. 19.

After all, both the structural composition of the urban working class and the demographics drawn to socialist politics in this period were far from homogenous. Mike Davis illustrates the distinction well, laying out a rough typology for European and North American cities in the years between 1838 and 1921. In these locations, the working class was composed of:

> the *formal proletariat* (all property-less wage workers); a *paleo-proletariat* of pauperised artisans; *semi-servile* unwaged family workers; the *agricultural proletariat*, many of whom were also poor peasants or farm tenants; and the *core industrial proletariat* (factory workers, miners, and transport workers). The last was objectively socialised by mechanised production … and did not become the true backbone of the labour movement until the 1880s, or even later.[72]

Similarly, he identifies the ambiguity that existed when revolutionary literature spoke of 'avant-garde detachments' of the class, which could be read in two different ways. The first was structural, referring to 'those portions of the core working class wielding the most economic power and capable of sustained militancy over long cycles.'[73] The second was subjective, referring to 'specific occupational groups, even with slight economic power, that were distinguished by the prevalence of socialist and anarchist ideas.'[74] The two very rarely matched:

> Until the First World War, printers, bakers, tailors, stone-cutters, cigar-makers, and maritime workers were most likely to incorporate explicitly revolutionary ideologies into their work-group subcultures … and from the 1890s casualised or seasonal workers like dockers, lumberjacks, harvest hands, and building labourers became major constituencies for syndicalism and anarchism. Only after 1916 did revolutionary metalworkers take the helm of the class struggle, and only in the great strikes of the 1930s did the assembly-line proletariat in 'Fordist' factories assume a central role.[75]

The major reference points for the modern industrial struggles of the twentieth century had therefore been defined in the murkier forms of class warfare

72 Davis 2018, p. 24.
73 Ibid.
74 Ibid.
75 Ibid.

that prevailed in the preceding century. The ideology of the movement was therefore indelibly shaped by 'the early dream of a social republic of small producers' which, by the 20th century, 'was transformed into a vision of an industrial republic of workers' councils.'[76]

But even this image is far too homogenous. After all, at apex of this classical labour movement, the emerging workshop hubs of Asia and the plantation and port complexes of colonial Africa were already beginning to advance to the forefront of revolutionary struggle. For example, in those same decades when 'the assembly-line proletariat in "Fordist" factories' was emerging in North America, the teeming industrial centres of Shanghai and Guangzhou – where informal production still dominated, often making use of handicraft techniques and relying on various forms of customary compulsion and variable piece-rate compensation – were wracked by a series of strikes that soon built up to insurrectionary proportions with the help of (first) anarchist and (later) communist labour organisers. After the tragic defeat of premature urban uprisings in 1927, followed by a campaign of white terror, the remaining communist organisers turned toward the countryside as their base of operations for the remainder of the ensuing civil war.[77] Similarly, the mass unionisation drives of the 1930s and 1940s in the wealthy countries took place at the same time as widespread organising among workers in nearly all the cities of colonial Africa – especially among porters, railway workers, drivers, dockworkers, and others in what would later be known as the 'logistics' sector, as well as those in social reproductive occupations such as teaching and government administration. General strikes rocked Nairobi, Dar es Salaam, Accra and many other cities across the continent both immediately before and after the Second World War.[78] The postwar consolidation of the European and North American labour movements in the 1950s then occurred alongside massive anti-colonial uprisings, such as the Mau Mau rebellion in Kenya. Inspired by the Chinese example, these uprisings would soon evolve into both majority peasant armies and minority foquismo insurgencies, which led revolutions across Asia and Latin America – and which soon emerged victorious in places like Cuba and Vietnam.

Meanwhile, among the 'avant-garde detachments' of the class that first joined in the revolutionary effort, their subjective impulse tended to be the product of historical accident more than their structural position. Nor did these avant-gardes emerge uniformly across the same general demographic. Among

76 Davis 2018, p. 25.
77 Chuang 2016a.
78 Zeleza 1993, pp. 1–23.

the peasantry in China, for example, communists 'found it hard to organise in southern villages' since 'the state played a much bigger role in mediating class relations' there, giving the Nationalists a strong foothold, whereas in the north 'villages were less divided by class and more unified against state intrusion,' and often had a long history of social banditry from which the communists could draw support.[79] Thus, it was not 'the peasantry' as such that formed the basis of the new revolutionary force but instead specific peasant formations in particular areas with the right combination of cultural, historic, and geographic inheritance to make them amenable to a general war against the state. The construction of the revolutionary subject was, therefore, the product of arduous organising by the communist party in a protracted, experimental process that spanned decades and survived through a series of grievous defeats before it successfully drove out both imperial armies and nationalist warlords. In other words, revolutionary subjectivity is not given, but made. In Neocosmos's terms, it is an ongoing process of 'subjectivation,' forced to balance contradictory elements of struggle (interests versus excess) within a complex and changing terrain of class and conflict. Beyond a certain degree of intensity, the process also names the balance between the civil and social war: the former requires concrete organisational practices capable of building practical power regardless of immediate content, in order to ensure the literal survival of those involved, while the latter requires specific methods for the expanding decommodification of society, necessary to ensure the emancipatory character of the overall process.

In other words, any 'avant-garde detachments' of the class are defined in purely practical terms. Though a detailed analysis of the political-economic terrain at any given time may hint at their existence, they are not in any way determined by some ideal overlapping of intersectional oppressions. Similarly, while they constitute the cutting edge of partisanship and therefore serve as the potential material for a future party, they cannot be formally described as an automatic or 'imaginary' party in and of themselves, operating through their spontaneous action alone. For these reasons, such detachments are extremely difficult to identify ahead of time or at a distance. Marx's political writings demonstrate the basic method of situational analysis that constitutes the starting point for this process of identification. But the question is essentially practical, rather than theoretical. It only blooms in the heat of escalating political confrontations and cannot be discovered ahead of time in any purely intellectual analysis of abstract dynamics or historical trends. The theory of politics

79 Chuang 2016a.

in a given era can only be elaborated in relation to incendiary struggles as they are actually occurring and 'proven' only through the success or failure of such a theory to take hold and prove itself out in practice. Thus, the classical (Marxian) theory of revolutionary subjectivity – which naturally leads to a theory of the party – would only form later, in debates between figures like Bernstein, Kautsky, Luxemburg, and Lenin. Of these figures, Lenin can perhaps be portrayed as the point of synthesis, negating the false opposition of organisation versus spontaneity while also offering the literal synthesis of theory and practice necessary for the 'proof' of the underlying argument. According to Neocosmos, Lenin therefore served as 'the first Marxist theorist to develop systematically a theory of politics.'[80]

8 Lamentation

Today, we turn to myth and capitulation as we flail blind and powerless in the face of an already-arrived catastrophe, the scope of which makes the challenges faced by the historic workers' movement look quaint by comparison. Betting on the emergence of new 'workers' movements' in ascendant industrial centres is not enough. Formulating fanciful philosophical theories about the potential birth of new universal subjects – some magical, multitudinous 'third thing' that serendipitously appears beyond or below the circuits of the economy – is not enough. Gambling on our favourite demographics in the endless game of disintegration is not enough. Nothing is enough, because all forms of identity forged within hellworld are bound in their own chains. They are isolated struggles for subsistence, yoked to insular demands because these demands are their very survival. As Davis reminds us, 'class capacity on larger scales arises conjuncturally … at the confluence of struggles (wages and suffrage; neighbourhood and factory; industrial agricultural, and so on)' rather than through the expanding interests of a single revolutionary subject ordained by the development of the productive forces.[81] And subjectivity, which takes the class beyond itself, only takes shape in the excess that arises through the confluence of myriad interests. Insurrection is therefore the passage through and beyond these delimited interests – an active, practical universality built in the tension between livelihood and emancipation, through the concrete construction of communist power.

80 Neocosmos 2016, p. 264.
81 Ibid, p. xviii.

While theory orients struggle, then, it must be grounded in direct and rigorous engagement with the planet-spanning horror of our society, refusing to dumb down the complexities of social domination in order to match the mythic archetypes of historical nostalgia. In the absence of such archetypes, it becomes clear that the emergence of revolutionary subjectivity is neither inevitable nor inherently fused to a particular demographic. It is instead forged through a protracted process of political experimentation and construction that takes root in *whatever* fractions of the class move earliest and most forcefully and which then develops only by exceeding these initial bounds. In this process – the process of building the communist party – the class is actively decomposed as a class through the revolutionary decommodification of society and progressively recomposed as the universal subjectivity of the species. Since labour-power is the special commodity that ties together the entire system of value, the progress of its annihilation is the basic measure of the revolutionary project – visible in the destruction of money as a universal substrate of survival, concrete and multifaceted 'developmental' gains for the majority of the species, and the advance of deliberative mechanisms for the management of production.[82] And, since this special commodity emerges not from the productive castle but from the graveyard of reproduction, visible in the commercial underworld beneath the factory city, it is in the reproductive sphere that it must, ultimately, be unmade.

I wandered through the LED-lit labyrinth until I had lost all orientation. Just as I can no longer recall the exact shape of this somnambulant maze, I can neither call to mind the precise path by which I left it. We can end, then, with pure fiction: As I passed deeper into the cavernous darkness, the stalls seemed to empty. Some closed for the night and many more closed for good in advance of the great demolition, always impending. Soon even the stalls themselves grew scarce, though torn fragments of canvas were visible here and there as if all had been swept off the field of frozen cement by the force of a beating blizzard wind. I was exhausted and could see no exit. The LEDs seemed to dim to a distant flicker. Dust and spores of mould danced like snow over ice. After an indeterminate amount of time, the path unspooled into what seemed the very heart of the labyrinth. Three stalls were propped up there, in a low pool of

82 In fact, the only way to truly track the progress of communist construction is by measuring the decomposition of labour-power and its expression in value (as visible in money). Labour-power will therefore be unwound in the practical process of communisation: first made into labour (as in the labour voucher), then into work (as in pure labour time or kcal accounting), and finally into people endowed with deliberative control in their web of relationships to others and to the non-human world.

shadow where the concrete dimpled concave as it does near a drain. The one on the left was empty, wrapped in black plastic, its walls gently billowing like the newly-woken darkness of a body bag laid out in advance of its corpse. On the right was a shuttered counter painted the pale yellow of abandoned prayer flags bleached in the alpine sun. And at the centre sat a crimson storefront, its yawning mouth spilling forth a clown-red cornucopia of common tourist curios: T-shirts with the classic succession Marx-Engels-Lenin-Stalin-Mao, replicas of Cultural Revolution pins and posters, and army-green messenger bags with 'Serve the People' scrawled over red stars in Mao's own calligraphy. A golden bust of Marx lay ensconced in the heart of the reliquary. And then the lights went out one by one in the labyrinth behind me. I held my arms against the cold and lofted my phone, its blue screen now the lone, flickering torch in the catacombs. The blue light glinted sharp white off Marx's gilded beard and at that very moment the silence was broken by a hollow laughter – joyless, hostile, like the mocking of a harlequin vaulting somewhere in the shadows of the world's stage – but when I looked around I saw no people, only things.

CHAPTER 5

The Hammer and Sickle Are Sleeping

Every winter the ice sinks into every crack in the cement, burrows between every sheave of corroded steel, breaks into every space between every gear of every one of the gargantuan machines left bound in blasted factories as if in punishment for their failed and half-forgotten gigantomachy. Over the seasons, the ice expands and contracts like a great lung, each bleak breath measured in months of boreal time. Decades of freeze-thaw cycles work in unison with great blooms of rust to gnaw the steel of abandoned equipment, splinter the brick of emptied buildings, and strip the last of the old socialist slogans off the walls. Development props up new structures here and there, liquid value trickling in from afar and freezing into ice-palaces of fixed capital in the cold northeastern winter. But these remain islands in a sea of rust. Only in the primate cities of each province has the pace of new construction truly kept the blight at bay. Elsewhere, the industries that remain are blunt instruments used for little more than survival – simultaneously market enterprises competing in glutted sectors like coal and steel, starved welfare bureaus providing a lifeline of employment for a shrivelling population, and criminal rackets in which everyone from shopfloor employees to high-level bureaucrats are engaged in constant low-level theft. New apartment complexes built mostly to bolster investment portfolios sit half-empty or half-built, strange hybrids of actual housing and empty floorspace, veiled under glossy planning proposals all rendered with the same uncanny iteration of themes in 3D – faceless mannequins, digital trees, vapour-smooth textures, and a diffuse angelic glow – a fusion of IRL ghost city and NFT.

China's northeast (Liaoning, Jilin, and Heilongjiang provinces, as well as the eastern prefectures of Inner Mongolia) was once the country's breadbasket and the heartland of socialist industrialisation, where Soviet technicians had been sent to collaborate with the victorious Chinese revolutionaries in the reconstruction and expansion of plants left by the Japanese monopolies which had once benefited from cheap labour in colonised Manchukuo.[1] The reconstructed Anshan Iron and Steel Company in Liaoning, inherited from the remainder of a colonial plant that had once been the largest steel producer in Asia, would go on to become a model state-owned enterprise in the socialist era, quickly growing into the largest single producer of steel in China even while ensuring that its

1 Hirata 2021.

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nearly one hundred thousand employees retained access to the 'iron rice bowl' of expansive lifetime welfare benefits linked to their jobs, with their children able to inherit their positions after their retirement.[2] Similarly, Changchun, the capital of Jilin province, came to be known as the 'Detroit of China' because of its central role in the automotive industry from the 1950s onward, with the First Automobile Works (FAW) factory founded there in 1953 as a keystone project of the first five-year plan. The populations of Liaoning, Jilin and Heilongjiang all saw extremely rapid growth from the 1950s through the 1970s, with the population of each nearly tripling.

By the turn of the century, these fortunes were reversed. Although the new industrial hubs in the sunbelt were built in part with raw materials sourced from the northeast, population growth in the region slowed relative to that of the coasts from the 1980s onward. In part, this was due to the persistent strength of the old socialist industrial system, which gave northeastern locales less incentive to leap into the labour-intensive export sector. However, as marketisation picked up pace, this very stability became a burden, with expensive welfare programs – in China, these were largely the responsibility of the enterprise, not the central state – inflating labour costs and driving down profits, making it difficult to offer competitive prices or afford expensive upgrades for ageing equipment. The years between 1998 and 2004 therefore saw the systematic closure of the least efficient state-owned enterprises (SOEs) and the consolidation of low-performing ones into new corporations led by the most profitable. In some cases, this involved outright privatisation, which was especially common for smaller SOEs in lighter industries. This process usually proceeded through the initial sale of shares to employees, followed by a consolidation of shares into the hands of managers as these firms converted to limited liability companies (LLCs) after the 1994 passage of the Company Law.[3] But many were also consolidated into new SOE monopolies in a process of 'corporatization' that 'involved reorganising traditional state-owned companies into joint stock companies or limited liability companies.'[4] In all cases, firms were restructured to better accord with modern corporate management practices, in

2 Anshan Iron and Steel was the basis for the 'Angang Constitution,' which laid out ideal principles for industrial management in the socialist period. Though these principles were portrayed as being implemented in practice across China during tours by prominent visitors like Charles Bettelheim, they were not accurate descriptions of the actual management of either the Anshan plant nor any of the large industrial enterprises in China at any point during the course of the socialist developmental regime. For more detail, see: Chuang 2016a.

3 Lardy 1998, pp. 53–54.

4 Lardy 2014, p. 46.

which 'decision making is nominally vested in a board of directors' and companies 'enjoy limited liability, have shareholders and must hold shareholder meetings, maintain shareholder lists, and issue stock certificates to shareholders.'[5] Most importantly, firms took on a legal obligation to their shareholders to turn a profit.

The largest of these firms were the 'group' (集团) corporations, formed through the consolidation of old SOEs and the continuous acquisition of new and often diverse assets throughout the first two decades of the twenty-first century. By 2020, Chinese group companies would grow to form the single largest national bloc on the Fortune 500, composing almost a quarter of the list – roughly the same as the US in number and revenue, greater in assets, but lower in profits.[6] Though the most influential group companies tended to trace their histories back to the fusion of several socialist-era SOEs, the most competitive private firms soon also grew into similarly diversified and massive conglomerates. Thus, while common portrayals will use heavy-industrial SOEs such as the China National Petroleum Corporation as examples of prototypical big businesses in China, private firms like Alibaba and Amer International are also group companies and have, over time, become increasingly representative of the more general trend. Meanwhile, corporatisation was itself a policy co-developed by the older generation of reformist bureaucrats, the younger generation of domestic capitalists, and foreign (especially US) investors. And it was largely experts brought in by these foreign firms who contributed the basic design of these new corporations. In fact, it is no exaggeration to say that all the exemplars of modern corporate organisation and even state ownership in China 'were imagined up, created, and listed by American investment bankers.'[7]

Nor was this merely the sideline project of a rogue faction of Wall Street investors. Instead, it involved major figures whose careers spanned the Clinton and Bush years, including Henry Paulson, who 'led the Goldman Sachs advisory team that prepared the IPO of China Mobile' in 1997, a decade before he became US Secretary of the Treasury.[8] The process involved close consultation with major US producer services firms and investment banks, which provided models of modern corporate organisation, funding to help with the process of

5 Lardy 2019, p. 82.

6 Mei, Maya 7 October 2022 'Fortune Favors the State-Owned: Three Years of Chinese Dominance on the Global 500 List', *CSIS*. https://www.csis.org/blogs/trustee-china-hand/fortune-favors-state-owned-three-years-chinese-dominance-global-500-list

7 Walter and Howie 2012, p. 11.

8 Huang and Véron 2022, p. 12.

both organisational restructuring and the modernisation of plant and equipment, assistance in reformatting management practices to accord with international legal and accounting standards, and easy access to international capital markets. Banks like Goldman Sachs were interested in the prospect because the relaxing of capital controls combined with the US boom that followed Japan's defeat in the trade war had left US firms glutted with cash and in search of lucrative investment opportunities worldwide. Corporatisation often even involved the outright purchase of a minority stake in the Chinese company by these foreign equity interests, followed by the company's launching of one or more IPOs on both Chinese and international stock markets, after which the foreign shares would be cashed out either all at once or over the subsequent decade.[9] The process was extremely profitable for everyone involved. The scale was also enormous, reshaping global capital markets in the space of two decades:

> From 1993, when IPOs began, to the early 2010s, Chinese SOEs have raised US$389 billion on domestic exchanges and a further US$262 billion on international markets, adding a total of US$651 billion in capital to the US$943 billion contributed by foreign direct investment.[10]

By the 2010s, China had thereby 'given rise to the second-largest equity capital market in the world, after New York.'[11]

For the northeast, however, the process was devastating. Mass bankruptcies were accompanied by mass layoffs, unpaid wages, and the forcing of veteran workers into early retirement without promised pensions:

> in a matter of seven years, the laid-off population mushroomed to a staggering eighteen to twenty million in 2001, from less than seven million in 1993 … academic estimates of the actual unemployment rate range between 7 and 10 percent.[12]

Later, more comprehensive estimates by the Chinese Academy of Social Sciences showed that, between 1998 and 2002, the total number of laid-off workers was likely closer to 60 million, which accounted for some 40 percent of all

9 Walter and Howie 2012, pp. 10–15.
10 Ibid.
11 Ibid.
12 Lee 2007, p. 73.

employees in state and collective enterprises.[13] The concentration of the old SOE sector in the northeast also meant that provinces like Liaoning were hit especially hard, since more than 70 percent of the workforce was employed in state or collective enterprises. Cities across the region were now becoming 'Detroits of China' in a grimmer sense. Among the province's eight million total workers in the sector in 1997, '21.4 percent were officially registered as unemployed or laid-off workers, 30.77 percent were retired workers, and another 33 percent were redundant workers.'[14] The actual numbers are almost certainly higher, as were the number of workers owed back wages or unpaid welfare benefits. Overall, however, the trend is clear: 'the total number of industrial SOEs dropped from 120,000 in the mid-1990s to only 34,000 by 2003' and, though the pace slowed after 2005, the number has fallen almost continually since.[15] Laid-off workers were forced to take new jobs in private enterprises or to try and survive on some combination of minimal pension payments and family support. Many migrated to major cities in the region or out to larger megalopolises on the coast.

As early as the 1990s, population growth had already slowed throughout the northeast and small towns across the region had begun to see initial losses in population. Though the urban boom in the south created steady demand for coal, steel, lumber, transport equipment and other regional exports, inbound investment was minimal compared to the coastal hubs over the course of the decade. By the early 2000s, population growth had slowed even further. In 2003, the State Council launched the first of many 'revitalization' plans for the region, none of which had more than a limited effect. By 2005, the corporatisation of the smaller, unreformed SOEs was slowed, even though many traditional forms of state support for such enterprises had been removed, leaving them in debt, unprofitable, but still major lifelines of employment, graft, and gleaning. In this context, the unrest that followed the Great Recession took on a grimmer cast in the rustbelt than in places like the Pearl River Delta. Tonghua, a city in Jilin near the border with North Korea, had been one of the recipients of a major investment associated with the regional revitalisation campaign, with approximately three billion RMB (460 million USD) in loans from the State Development Bank earmarked for the installation of modern equipment in the local steel mill. The

13 Lee, Amanda 27 July 2021 'China jobs: is Beijing's retreat from state-owned enterprise reform holding back job growth?', *South China Morning Post*. https://www.scmp.com/economy/global-economy/article/3142556/china-jobs-beijings-retreat-state-owned-enterprise-reform

14 Lee 2007, p. 74.

15 Naughton 2018, p. 344.

mill itself had long been in debt and was only partially restructured in 2005, with a minority share sold to Jianlong Steel, a private company from Beijing. Ground broke in 2007, but the project stalled. Meanwhile, Jianlong had taken over much of the company's day-to-day management, squeezing workers and dropping the remainder of the company's old welfare provisions, such as free heating to residents (in an area where winters regularly drop as low as negative 30 degrees Celsius).

Then, following the crash, the price of steel plummeted. Jianlong initially sought to sell its shares but, when prices rebounded with the stimulus, the firm turned around and struck a deal with the provincial government to instead gain a majority stake in the Tonghua mill in exchange for a modest investment and some asset swaps. When the deal was announced in July of 2009, it triggered immediate protests. Given the size of the mill and the degree to which the town depended on it, the small crowd of townspeople that had gathered in front of the company offices was soon joined by the mill workers themselves. The largest mobilisation included over 10,000 people in total. When a Jianlong executive named Chen Guojun showed up to talk down the protestors, the crowd ignited, pushing and shoving Chen until he fled into a nearby office building. Police and paramedics arrived but could hardly make it through the riot. When they finally found Chen, he'd been beaten to death. Though Jianlong had promised not to fire any workers in the acquisition and had mostly focused on reducing excessive wastage, trimming wages, and excising the firm's remaining welfare commitments, what the private company didn't quite grasp was the true extent to which the plant's existence was linked to the town's livelihood: 'As well as supporting hundreds of contractors, it was the centre of a micro-economy in stolen materials and equipment that supplied black markets, junk yards, and illegal furnaces.' Workers commonly smuggled iron ingots in their winter clothing, 'used as feedstock for small, unlicensed furnaces.'[16] The major concern of protestors was not simply the prospect of layoffs or the fact that Jianlong executives were still making millions each year, but instead the likelihood that the new owners would stop rampant theft and pilferage. Though wages from the plant guaranteed minimal subsistence, it was only these sidelines that offered any upward mobility.

While the infrastructure boom following the Great Recession helped to buoy demand for steel and coal, cities like Wuhan had since ascended as major competitors in the supply of building materials and construction equipment. The

16 Bloomberg News 1 March 2016 'Death and Despair in China's Rustbelt', *Bloomberg*. http://www.bloomberg.com/news/features/2016-03-01/death-and-despair-in-china-s-rustbelt

northeast again lost out. By the 2010s, provinces like Liaoning were perhaps most famous for producing falsified fiscal data and output statistics, rather than steel or cement.[17] It was only when this practice was cracked down on – as part of both the anti-corruption campaign and ongoing reforms of the methodology used by statistical authorities – that the true scale of the decline became apparent. Meanwhile, few of the firms that were now relocating inland from the coasts looked to the northeast as a prospective home and, among the minority that did (as in the already-established pharmaceutical sector in Jilin), investment was concentrated in provincial capitals. Among these, the minor megalopolis centred on the city of Shenyang, located along the northern rim of the Bohai Bai, has been by far the most successful. In general, then, northeast revitalisation subsidies have mostly helped to cultivate modest clusters of high-end firms in aeronautics, machine tools, automotives, and software in the region's central cities like Shenyang and Changchun. But places like Tonghua simply continued their decline. A little more than a year after the riot, the Tonghua plant was sold to another Beijing company, Shougang Steel – a larger, corporatised SOE – which finally completed the expansion planned in 2003. Though the higher steel prices seemed to appease all parties at the time, demand peaked by 2013 and then collapsed. In the cold winter of 2015, the manager of the newly expanded mill committed suicide in his office. That summer, the company announced layoffs.[18] By the next winter, the new owners had responded to government calls to reduce overcapacity in the sector by shutting down two of the furnaces in the plant. As of 2021, neither employment nor output had recovered.[19]

1 The Society of Mutual Destruction

Cases like Tonghua were the rule, rather than the exception. Between 2010 and 2020, all northeastern provinces lost population, cutting against the national trend. The only other provinces to see population loss over the same period were coal-dependent Shanxi (-2.2 percent) and sparsely populated, historically poor Gansu (-2.2 percent). Though the coasts continued to see the strongest

17 Tang, Frank 18 January 2017 'Chinese province admits to cooking its books', *South China Morning Post*. https://www.scmp.com/news/china/economy/article/2063125/liaoning-governor-confirms-economic-data-faked-2011-2014

18 Ibid.

19 Shougang 2023, 'Shougang Tonghua Steel Group', *Shougang*. https://www.shougang.com.cn/en/p1/IronSteelIndustry/20170329/827.html

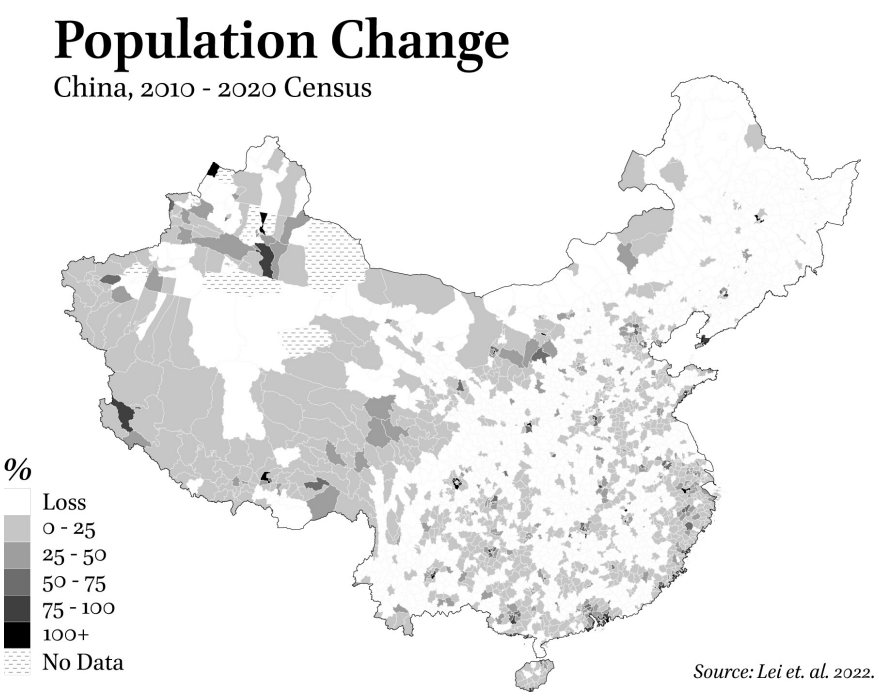
population growth (20.8 percent in Guangdong over the decade) – alongside Xinjiang (18.5 percent) and Tibet (21.5 percent) where large subsidies for investment and for new Han settlers stimulated migration – the interior provinces also saw major gains, with Henan's population growing 5.7 percent, Shaanxi's 5.9 percent, Guizhou's 11 percent, and Chongqing's 11.1 percent. By comparison, Heilongjiang lost 16.9 percent of its population over the same years and Jilin lost 12.3 percent. Declines in Liaoning (-2.6 percent) and Inner Mongolia (-2.7 percent) were smaller, but still substantial. Altogether, in the northeast, 'the three provinces lost more than 30 percent of their population compared to 2010.'[20] Since outmigration was driven by the young, the rustbelt also saw its population pyramid invert far faster than the rest of the country. According to the 2020 census, about a quarter of Liaoning residents were over 60, the highest ratio of any province. The northeast has thus become a net recipient within the new centralised pension system (implemented in 2018), which requires that each province contribute a portion of the provincial pension fund to the central government, which then redistributes these funds according to need. In 2020, Heilongjiang, Jilin and Liaoning received roughly 20 percent of these funds, despite composing only around seven percent of the total population.[21]

But population loss was not evenly distributed across the region. Instead, losses tended to be the strongest in rural areas, lower-tier cities, and in the far north, and weakest in provincial capitals and in the south near Bohai Bay.[22] Between 2010 and 2020, the population of Liaoning's provincial capital Shenyang increased by 55 percent and that of Jilin's provincial capital Changchun by more than 18 percent. Only Harbin, the capital of far-northern Heilongjiang province, saw its population decline (-5.88 percent). On the one hand, this was in keeping with trends elsewhere. Rural areas and small cities across the country have long seen either population declines or bursts of local urbanisation, as is visible when population change is mapped at the county scale rather than the provincial one (Map 9). For example, all of southwestern Guizhou's rural counties lost population between 2005 and 2015, while provincial capital Guiyang grew by some 31 percent and the built-up areas of neighbouring Chongqing grew at a similar pace. This is even true in coastal provinces like Guangdong, which saw continued population loss in its rural

20 Leng, Sidney 14 May 2021 'China's rust belt population plummeted in the last decade, exacerbating regional economic divide,' *South China Morning Post*. https://www.scmp.com/economy/china-economy/article/3133397/chinas-rust-belt-population-plummeted-last-decade

21 Ibid.

22 You et al. 2021.



MAP 9 Population change between 2010 and 2020 censuses

peripheries despite the ongoing growth of the Pearl River Delta megalopolis. On the other hand, few other areas have seen the degree of rural population loss visible in the northeast, which has left entire villages and even large swaths of old industrial cities essentially abandoned.[23] On the map, the entire region appears as little more than windswept wasteland.

As in rustbelts elsewhere, these landscapes of decay have become a favourite subject for photographers and filmmakers. Among the most striking of these portrayals are a series of black comedies by director Geng Jun, all set in and around Geng's own hometown, Hegong, Heilongjiang, near the border with Russia and best known for a series of deadly mining accidents in 2008 and 2009 which killed more than 100 workers. Geng himself is clear about the central role of the rustbelt landscape in his art: 'When people watch my films, maybe they will see different actors and actresses and characters, but the main character in my films is the setting.'[24] His movies are full of long, panoramic shots of crumbling walls and fields left fallow. The proletarian characters that move through

23 Wang Yun 2018 'Shrinking Cities: Stories from China's former boomtowns,' *Sixth Tone*. https://interaction.sixthtone.com/feature/2018/shrinking-cities/index.html

24 Quoted in: Sorace 2018.

this alien landscape hardly seem to inhabit it – living in half-collapsed housing built during the heyday of the socialist era, burning coal pilfered from the nearby mine in open stoves to keep warm – instead seeming to float unmoored from the cold landscape that reflects their own passivity. In his 2017 film, *Free + Easy*, 'the characters frequently refer to their lives as "*huangfei*", meaning fields that are no longer cultivated.'[25] Among his many recurring themes are locals pretending to be from out of town, often supposedly searching for relatives only to find them gone, their houses demolished, a ruse to ask passersby for money to pay for a ticket to leave, though none ever do. Uncultivated, the frozen fields and the community that once subsisted on them can do little more than drift numbly toward a slow annihilation.

On the surface, Geng's films offer a simple symbol of the inequities that have accompanied rapid development, focusing the audience's eye on a forsaken corner of criminality and proletarian survival in much the same way as conventional realist filmmaking – of which China already has many established representatives, the most renowned of which is likely Jia Zhangke – or as seen in the more recent burst of neo-noirs and crime dramas from directors such as Lou Ye and Diao Yinan. In fact, by the 2020s, a series of prominent depictions of the Northeast within the neo-noir genre had even led to something of a cultural revival for the region. These neo-noirs became known for narratives intermixing modern murder mysteries with political intrigue set in the late 1990s and early 2000s, often centred on the closure of state-owned enterprises.[26] And Geng Jun's films certainly contain scenes that hammer home social commentary in much the same way: two men warming their hands over an open coal fire, staring at a calendar with a glossy picture of a smiling woman backlit by a glowing modern skyline pinned to the peeling wall of a one-room hovel; a man dressed up as an elderly woman singing old revolutionary songs for money; a scam artist who, chased after by a young man he's just robbed, lectures his pursuer: 'You watch the news, surf the web, read the paper. You should know that our society needs peace and harmony. You're the future.'[27] But the very repeti-

25 Ibid.

26 The larger cultural trend has been referred to as the 'Dongbei Renaissance.' By far the most famous example is the renowned television drama *Long Season* (漫长的季节), directed by Xin Shuang, who had once been a well-known figure in the Beijing punk scene. But the phenomenon began in the literary sphere, epitomised by the work of Northeastern fiction writer Shuang Xuetao, whose novella collection *Moses on the Plain* (原平上的摩西) has been adapted by at least three different neo-noir directors: in a TV drama of the same name by Zhang Dalei, a forthcoming film of the same name by Diao Yinan, and a 2023 film called *Fire on the Plain* (原平上的火焰) by Ji Zhang loosely based on the story.

27 Geng 2016, 07:00–07:38.

tion of such contrasts soon peels back their cheap symbolism to reveal a sort of hopeless love smouldering in the bleakness. Rage at the palpable devastation of such poverty fuses seamlessly with a deep, quiet compassion. Alongside panoramic landscape shots, Geng also offers long close-ups of melancholy men sharing food, beds, and fires, scenes of 'homosocial tenderness among thieves and liars who have "nothing to do" and no one to rely on but each other.'[28] Like one of Geng's characters, who pretends to be a Buddhist monk whose monastery has burned down in order to beg for money, the affect might best be described as a sort of selfish selflessness.

As in the riots in Tonghua, subsistence is closely interwoven with criminality. Geng himself describes his films as portraying a 'society of mutual destruction … in which people of all class backgrounds exploit and hurt one another.'[29] Most of his characters are played by non-professional actors from the area and, again reflecting the desecrated landscape, many are scarred, deformed, or disabled. For Geng, the society of mutual destruction isn't merely an issue of exploitation, then, but also 'destroys the fabric of meaning of our community, the basic sense of morality, and order, as well as our environment.'[30] The films operate according to a general rule in which almost all the characters are thieves of some sort, with the plot following a protagonist who robs others only to discover that most of the people he robs are also, in fact, criminals like him. These slapstick collisions recur again and again until the jokes grow dull and even the thieves seem to tire of the endless theft, giving away what they've stolen in sudden acts of charity as random as the robberies themselves. Among the only individuals immune from the area's ambiance of criminality is a young Christian portrayed as a holy fool with a speech impediment, constantly preaching to others and singing hopeful gospels out of tune. Altogether, the result is an economy of blight populated by thieves and idiots, in which stolen goods eddy through the town, effectively shared in common and often simply given back.

Similarly, none of the scams that propel this economy are particularly successful. One thief tries to rob a local mine worker by threatening him with a hammer, but the worker hasn't been paid wages in months and has nothing on him aside from a small bag with a few goods for the New Year: oranges, fireworks and a toy gun for his children. The thief takes the oranges and fireworks

28 Ibid.

29 Quoted in Wildman, John 30 January 2017 'Ten Burning Questions: Jun Geng's FREE AND EASY', *Films Gone Wild*. https://filmsgonewild.com/ten-burning-questions-jun-gengs-free-and-easy/

30 Ibid.

but, after questioning the miner, hands back the children's toy. In Geng's world, living an honest life is thankless and foolish and those lucky enough to have jobs are either corrupt police officers or workers and bureaucrats faced with the anxiety of continual extortion. In one case, the area's chief of reforestation has been tasked with overseeing trees planted along a certain road but finds himself harried by illegal loggers who chop down and carry away his trees one by one. Unable to stop them, he simply drops to his knees and mourns the stumps. The only safety is that earned through countermeasures of violence and crime. When the hammer-wielding thief later returns to the mine, he finds that the miners are walking in groups, each armed with a sickle for self-defence. The basic symbols of the socialist past thereby become little more than weapons turned against one another in the never-ending dance of mutual destruction. In these blasted landscapes, hope is not necessarily lost but indefinitely suspended – a condition made clear by the title of this latter film: *The Hammer and Sickle are Sleeping*. In all of Geng's works, the characters themselves often meditate on questions of sin and compassion but are unable to find any way out. When the police question the young Christian after he and two others are robbed, asking him if God can tell him where the thief is, the young man simply responds: 'God tells us: all people commit sins.' The corrupt police officer scoffs: 'So we should all go to jail?' In interviews, Geng himself confronts the same question:

> Why is everything messed up? Why is there collusion among officials and business people? Why do we suffer hardship? It is because we never resisted or fought. Instead, we believe that we are weak … All of us are criminals and participants [in the system].

Nor is he exempt from his own scorn: 'My stories are only a surface layer, but in my heart, an even deeper layer is that I am also, in fact, a criminal.'[31]

If Xu Lizhi was the tragic prophet of sunbelt exploitation, then Geng Jun is the augur of rustbelt abjection. On their own, neither paints a comprehensive picture of the proletarian condition. Xu's workplace horror hardly captures the cold and quiet suffering of those who never made it to the factories in the first place. Meanwhile, Geng's portraits of communal compassion withering in the torment of a winter with no end show us only the forsaken spaces – a panoramic long-shot tracking nearly empty landscapes left behind by a progress long decamped for sunnier climes, reduced here to the LED glitter of spectacular

31 Ibid.

PHOTO 8 Still from Geng Jun's *Free + Easy*. Citation: Geng Jun (Director) *FREE + EASY* [FILM], BLACKFIN (BEIJING) CULTURE & MEDIA CO., LTD. 24:59

cities flattened on the glossy pages of a ripped calendar pasted over peeling paint. Both are true, though partial, pictures of the same phenomenon: the sculpting of a population under the dual pressure of development and demolition. In technical terms, we might even say that Xu's poetry and Geng's films are something like living sculptures of real subsumption, designed to capture the social mechanics of relative surplus value extraction, albeit from opposite ends. Despite the modern industrial cast of Xu's poetry and the looming presence of heavy industry lurking behind Geng's landscapes, then, both are essentially artists of deindustrialisation. Geng offers a view of real subsumption from the abject exterior of formal employment, where the process can only appear as a general emptying: the loss of population, the land falling fallow, the very trees stolen by anonymous thieves in the night. Xu offers a view of subsumption from its interior, where the time discipline of the factory invades and abrades both mind and body. Even in this sunbelt setting, though, the transformation of the labour process tends toward the replacement of humans by machines.

While both rustbelt and sunbelt have seen falling employment in industry, neither have experienced sustained or general declines in the output of industrial goods, whether measured by total mass or market price. Of course, output of certain goods such as crude oil has certainly fallen, there have been a number of short-lived declines in the output of crucial materials like steel – as in the deflation of the commodity supercycle in the 2010s – and Heilongjiang has only recently seen industrial output rebound toward its earlier peak at the height of the stimulus. But, overall, the gutting of the rustbelt has been accompanied by increasing productivity and greater spatial concentration within the region's heavy industries. In this sense, provinces like Jilin have experienced deindus-

trialisation in much the same way as states like Michigan, seeing loss of population, declines in employment, massive corruption scandals, and stark social inequity, all accompanied by continual increases in industrial output and the consolidation of globally competitive, high-tech heavy industries. Meanwhile, sunbelt hubs like Guangdong and Zhejiang are scrambling to pivot toward services, software, and hyper-mechanised production in much the same way as California and Texas once did. Viewed at the level of basic livelihoods, however, this means that Chinese proletarians are increasingly faced with the same conditions of precarity, informality, and distance from production seen elsewhere. Xu's poetry just as accurately describes the conditions of young workers in the auto industry of Alabama as in the electronics industry of Guangdong. Meanwhile, Geng's films could be transplanted nearly word for word to the frozen wasteland of Wisconsin – in fact, midwestern noir seems to serve as something of a model.

In other words, despite being grounded in a particular historical context, there is nothing uniquely 'Chinese' about these stories. Any sense of exoticism read into them is little more than a product of pop orientalism: our minds fed a constant slurry of cheap clickbait with dark undertones of dystopian peril.[32] But the reality is that, regardless of language and country, we all live in the same society of mutual destruction so heartrendingly depicted by Geng, who himself argues as much: 'I have never thought that I film society's lowest rung and weak groups. On the contrary, I think that I film the great majority of people.'[33] Bodies are broken in much the same ways by work as by the lack of it. Similarly, the landscapes of this world are fractal: metropole and hinterland, sunny beach and frozen field, wage and wastage all bloom into one another in an infinite recursion running up and down the scale. The stagnant surplus pop-

32 In this way, China acts as a sort of mirror wherein it becomes possible to see the dystopian features of our own lives only by displacing them in a racist fashion onto a foreign people: the much-feared 'social credit score' is, in effect, the same thing as the criminal records and credit scores that already act as constraints on opportunity in high-income countries; the supposedly pervasive digital surveillance and facial recognition technology being rolled out in Chinese cities is a distant shadow of the surveillance systems already implemented by US policing and security agencies, while the most advanced and comprehensive facial recognition systems in the world are overseen by Target and Wal-Mart; even the mass incarceration system set up in Xinjiang was, quite literally, built by US software companies and modelled on both the US policing and prison system and global infrastructures for counterterrorism and mass incarceration of migrants. The belief that China is somehow uniquely authoritarian or despotic demonstrates, at best, a wilful ignorance of the real conditions that prevail for poor people elsewhere and, at worst, nothing more than run-of-the-mill racism.

33 Quoted in Sorace 2018.

ulation of the rustbelt's most forsaken corners offers a particularly poignant image of the general condition not because it is unique but because it is our own shared loss, unadorned. And, with no way out, those frozen to the fallow landscape are left with nothing but fantasies. The main character in *Free + Easy* is a thief posing as a travelling salesman marketing soap from his suitcase. His free sample, once sniffed, knocks his victims unconscious. The gag is elegant, recurring through its repeated failure: one target has a cold and can't smell anything, another flatly refuses ('I don't need to smell it, I believe you, thanks'). But a different tone soon emerges under the absurdist joke. When successful, the soporific substance seems to induce a sort of bliss in the sleepers, 'providing a momentary respite from a world with nothing to offer.'[34] One describes the effect as 'free … and easy,' giving the film its title. Another is an insomniac glad to finally get a deep sleep. Yet another (played by Geng himself) explains in more detail: 'It was like I was having a dream. It was hot, and I was thirsty. All the women on the street were wearing beautiful dresses. I was somewhere warm.'[35]

Throughout his films, Geng continually plays with this tension between ecstasy and suffering, and the two are often united in scenes of beatific sleep as characters fall unconscious, their bodies stretched out at awkward angles on the frozen ground or in run-down apartments, facial expressions lost somewhere between bliss and agony. On the one hand, such scenes capture a shared warmth that somehow persists beneath the icy ruin of the world. On the other, these reveries are a relatively blunt metaphor for the hollow fantasies that linger like a fog over the sacrificial bloodlands of the rustbelt. Even the get-rich-quick schemes that seem to work elsewhere collapse in the black mud of Heilongjiang's hinterland: in a later film (2021's *Manchurian Tiger*) one of the main characters is a formerly wealthy debtor who lost out in a real estate scam after the poorly built project stalled, failing to sell any units to prospective buyers. He'd only provided the materials for the foundation and, as one gangster come to collect on the debt admits, the failure wasn't really his fault. Of course, he has his thugs beat the debtor anyways. The mundane character of both his scheme and its failure is itself the message. Outside the provincial capitals, the northeast's housing bubble has been relatively unspectacular and prone to sudden deflation. Scrounging wealth from speculation in such places is, as Geng emphasises, a dog-eat-dog affair. But there are few other options. Heavy industries like steel and automotives are already monopolised

34 Sorace 2018.

35 Geng 2016, 26:45–27:00.

and hyper-competitive. Extractive sectors like timber, coal and crude oil are increasingly limited by dwindling reserves and strengthened environmental regulations. Only fantasies are left.

2 Yelling into a Microphone

It is more than a little ironic, then, that among of the region's most successful exports in the 2010s were its fanciful livestream performances piloted by bored and futureless youth – mostly left-behind young men – who gravitated online for lack of anything better to do. MC Tianyou, the region's greatest success story, had more than 23 million followers on popular livestreaming platform YY and reportedly earned tens of millions of RMB a year at the peak of his fame in 2018.[36] But he was simply the best-known of the region's many *hanmai* (喊麦, literally 'shouting into a microphone') performers, who formed the foundation of the northeastern livestreaming industry in the 2010s. Livestreaming built momentum further via its integration with e-commerce and the rapid spread of influencer-led Ponzi schemes. Successful streamers would often double-down on their reach by not only earning cash from their nightly sets but also charging for training courses that helped others get into the industry, helping to trigger its exponential growth. Many of the practices piloted by Northeastern streamers would thereby shape the monetization structures adopted across the livestreaming economy as a whole.

As a type of music, *hanmai* is a strange sort of northeastern-accented rap, usually accompanied by frenetic turbofolk-style rhythms, pirated audio clips, comedic bits, and laugh tracks, all conducted in a simultaneously hyper- and post-digital aesthetic defined by the delirious visual design and participatory nature of Chinese video platforms, best symbolised by the notorious *danmu* (弹幕, 'barrage' or, literally, 'bullet curtain') comments that course from left to right over the surface of digital streams, quickly reaching a density that can block out the underlying image. But *hanmai* has always been more than simply a musical genre, developing out of the MC culture found in the discos of lower-tier cities and small towns in the 1990s and 2000s and actively coevolving with northeastern folk traditions such as *errenzhuan* (二人转), a two-person style of opera popular for its short sketches and comedic dialogues performed in the vernacular, often sprinkled with vulgar language and sexual innuendo.[37] The

36 Xu and Zhang 2020, pp. 333–8.

37 In the same years, many *errenzhuan* performers also moved online. See: Tang Xiaolan

PHOTO 9 Still from an early online *hanmai* performance by MC Shitou, with *danmu* coursing across the screen, mostly profanity in English and Chinese. Citation: MC Shitou, 'MC 石头字幕版 ...' YOUTUBE, UPLOADED BY DONGGANCHAOGE0609. 3:28 HTTPS://WWW.YOUTUBE.COM/WATCH?V=4LLLHFTONPA

genre's gestation also began through distinctly offline venues, such as street vendors selling pirated mixtapes or early *hanmai* artists performing at the 'live-house' venues that became popular in the 2000s.

Similarly, the move online began in the cheap internet cafes popular among poor youth, who recorded videos using low-quality webcams and microphones. MC Shitou was the first *hanmai* artist to break through into the streaming market when remixes of his videos began to propagate on early video platform Acfun. These first songs also set the standards for a certain visual tone that overlapped somewhat with that of the *shamate* subculture in the same years (MC Shitou himself often sported a *shamate* hairstyle). Thus, in addition to profanity in Chinese and English, the *danmu* comments appropriated 'the stigmatised aesthetic of the rural and the grotesque' by simulating the omnipresent, text-only ads with QQ contact info ('coffin sale, contact 484854,' 'change your

12 June 2019 'The Livestreamer Thriving in a Desolate Liaoning Coal Town', *Sixth Tone*. https://www.sixthtone.com/news/1004103/the-livestreamer-thriving-in-a-desolate-liaoning-coal-town

fate, contact 741165') pasted to walls and telephone poles across China's hinterland.[38] Similarly, the name *hanmai* itself implies a certain rural vulgarity, representing its own exclusion from the formal music scene:

> Hanmai is often denigrated as a 'malformed' rural DJ practice in China. *Han* – 'yelling,' instead of singing, rapping, or even growling – implies a supposedly 'distasteful' approach to what it means to DJ; *Mai*, or mic, also happens to be a homophone of 麦, or wheat, an agricultural product associated with the countryside.[39]

The move online only enhanced these undertones. Meanwhile, MC Shitou was soon displaced by new stars more adept at using young streaming services like YY, which had themselves evolved from an eclectic range of participatory apps on the early Chinese internet. For example, short video platform Kuaishou, known for its large base of rural content creators and its popularity outside of Tier 1 cities, began as an app for making gifs. Today it is one of China's largest platforms for livestreamed ecommerce.[40] Similarly, YY began as a voice chat app for gamers. These apps therefore brought with them a certain eclectic, comedic, and participatory culture, contributing to the carnivalesque atmosphere of the average *hanmai* stream.

MC Tianyou soon became the representative of this new generation, both in style and background. Born Li Tianyou and raised in Jinzhou, Liaoning, he saw both his parents laid off from well-paying jobs at state-owned factories in the 1990s. In response, he dropped out of middle school to work odd jobs, running a streetside barbecue stall, selling used cars, and even street dancing. But Li only found success when he began performing in front of a webcam in 2014, where his ranting and rapping 'about unfaithful girlfriends, sky-high housing prices and spoiled young people' made him into 'a hero to a generation of disaffected young people in China's smaller cities and rural areas,' who resonated with his attitude of being 'spiteful toward elites, skeptical of authority and eager for an escape from menial work.'[41] Nor is MC Tianyou an exception. Other major *hanmai* streamers come from similar backgrounds and draw from similar

38 Zhang Xu 2019, pp. 63–8.

39 Zhang, Dino Ge 21 February 2018 'MC Shitou: Icon of a Fading Internet Subculture', *Radii*. https://radii.co/article/mc-shitou-icon-of-a-fading-internet-subculture

40 Meng Siyuan 8 January 2021 'Is Kuaishou still China's Short Video "Platform for the People?"', *Radii*. https://radii.co/article/kuaishou

41 Hernandéz, Javier C. 15 September 2017 'Ranting and Rapping Online in China, and Raking in Millions', *The New York Times*. https://www.nytimes.com/2017/09/15/world/asia/china-li-tianyou-livestream.html

themes. For example, MC Brother Li, who earned between 150,000 and 200,000 USD per month at his peak of popularity, was raised by northeastern corn farmers, dropped out of school as a teenager, and moved from his home village to Gongzhuling, a small city in Jilin, where he took a job as a mechanic and began livestreaming as a hobby in the evenings. Within a few years, he had founded his own media company and financed ecommerce clothing lines and a series of online films. Meanwhile, by marketing training courses to friends and fans, MCs like Tianyou and Brother Li quickly grew their ranks. One apprentice of MC Brother Li, Wang Baocai, quickly went from 'from working as a chef to earning a living through regular broadcasts to his 1 million fans.'[42]

In addition to coarse and comedic working-class themes, *hanmai* also draws from lowbrow appropriations of classical Chinese literature and homegrown fantasy genres. The song 'Got Drunk Alone' (一人我饮酒醉) by MC Gao Di – made famous after being covered by MC Tianyou – is representative of the general trend, combining the tragic tone of love-scorned working-class masculinity with grandiose themes common across the genre: 'defeating the emperor, fighting against fates, comradeship in wars, betrayal by betrothals.'[43] While the basic combinations evoke certain cultural trends in other rustbelts – horrorcore in the US being the most common comparison, complete with its own carnivalesque atmosphere and dark fantasy mythos – there is nothing quite like the peculiar lyrical recipe of *hanmai*, which evokes familiar themes of lost young men despised by elite culture, denied upward mobility, and unable to achieve basic human companionship (not coincidentally, *hanmai* songs are often held up as examples of 'incel mentality') while also jarring listeners with its combination of vulgar pretentiousness and affected classicism like some ungodly amalgam of Eminem and Tolkien. Fantasy epics about storming heaven and fighting the Buddha are recited in the rapid patter of northeastern Mandarin, intercut with vulgar jokes, and competitive pranks to form a single grand allegory for life without a job or a girlfriend. All the while, 'shit shit shit shit shit' (屎屎屎屎屎) machineguns across the screen in English and Chinese *danmu* comments.

In this sense, *hanmai* has to be contextualised alongside the simultaneous boom in gamer culture and online fantasy novels, both of which have been accused of promoting the same sort of moral degeneration in their audiences and, for this reason, were subject to similar moral censure at the end of the

42 Jubb, Nathan 16 November 2016 'My Evening with China's Live-Streaming Rich Kid', *Sixth Tone*. https://www.sixthtone.com/news/1564/my-evening-with-chinas-live-streaming-rich-kid

43 Xu and Zhang 2020, p. 334.

decade. Authors of online *xuanhuan* (玄幻)[44] fantasy, for example, are often condemned in much the same terms as *hanmai* MCs:

> The producers of Xuanhuan novels are usually unknown amateurs, who are often criticised for lack of literary merit, mistakes in common sense, and contradictory logic, being accused of misleading youth into addictive, restless, and illusive excitement.[45]

Just like the most popular *hanmai* videos, well-known *xuanhuan* websites like Qi Dian receive millions of visitors and the best-performing stories are often adapted into films, TV series, and videogames. These fantasies also contain a similar element of social critique and desperate striving for upward mobility: 'the pleasure of reading this genre of web novels … is in the vicarious triumph over the oppressors in "real" hierarchical society,' though the logic of such fiction is 'not to topple capitalism or imagine how a class society could operate in an alternative way, but to instrumentalise the process of social mobility, represented by climbing the hierarchy in the fantasy world.'[46] In hybridising with these online fantasy discourses, *hanmai* is therefore

> an attempt to (re)interpret, imitate, and even caricaturise perceived high culture and historical fantasies, especially from the perspective of the archetypal Chinese male today – the precariously hardworking and involuntarily celibate male whose main pastimes are web novels, mobile games, and online videos. The lyrics embody the escapist desire for another world where the protagonist can be the masculine ideal.[47]

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44 There are three major subgenres of Chinese fantasy: *Xuanhuan* is the broadest, combining Chinese folklore and mythology with a wide range of settings. *Wuxia* (武侠) are 'knight errant' martial arts stories defined by themes of chivalry, tragedy, revenge and romance. *Xianxia* (仙侠) are 'immortal heroes' stories that feature magic and supernatural beings, with a strong Daoist theme. *Wuxia* is often thought of as 'low' fantasy and *xianxia* as 'high' fantasy, with *xuanhuan* serving as a broader category bridging and exceeding the other two while also placing them in dialogue with Western fantasy tropes. In reality, each of the three are often subdivided into further subgenres based on shared themes such as 'Magic Campus' (魔法校园) and 'Modern-day Sage Cultivation' (现代修真). For a helpful glossary of terms related to the genre, see: Immortal Mountain 2017 'Glossary of Terms in Wuxia, Xianxia & Xuanhuan Novels', *Immortal Mountain*. https://immortalmountain.wordpress.com/glossary/wuxia-xianxia-xuanhuan-terms/

45 Wang 2017.

46 Xu and Zhang 2019, p. 66.

47 Ibid.

These very features would later be cited in crackdowns against many of the genre's major representatives, accused of posting 'lewd' content online.

Meanwhile, the very lowbrow popularity of *hanmai* locked it out of mainstream acceptance within China's music industry. In the same years that MC Tianyou's revenue began rising into the millions, several Chinese cities also saw the development of a thriving hip-hop scene complete with its own high-profile feuds – most prominently between Changsha and Chengdu, serving as the scene's eastern and western poles – major international record deals, and reality TV shows. But, in musical terms, the genre demonstrated little innovation or localisation of the style, mostly just mimicking the standards set by US hip-hop in both musical form and in its imitation of banal gangster aesthetics. Ironically, *hanmai* itself is probably the closest thing to what hip-hop itself once was: an entirely indigenous music of a country's underclass, evoking the very real hardship and criminality that defined every aspect of life in areas sacrificed to progress. Nonetheless, *hanmai* MCs found themselves almost entirely excluded from the mainstream music platforms controlled by pop idols from Shanghai striving after the success of their counterparts in Seoul and rappers from Chengdu playing dress-up as gangsters from LA. When journalists and scholars writing about the emergent indigenous genre attempted to interview representatives from the music industry, however, they were consistently turned down on the grounds that *hanmai* simply was not music. As Shanghai rapper 'Mr. Weezy' said of the genre: 'It's just a freak product made by Chinese farmers, country bosses, village folks, and second-tier city residents with low culture.'[48] After MC Tianyou's apprentice Nanxi rapped *hanmai* classic 'Thunder' on the hit reality show *Rap of China*, well-known singer-songwriter (and iconic judge on *Voice of China*) Yang Kun took to his own livestream to condemn the song: 'There's no melody, no rhythm, no groove … disgusting!'[49]

3 Idyll

Soon, the coarse and criminal undertones of the genre saw it targeted for removal by censors. Ironically, this process began with a crackdown on the very mainstream hip-hop scene that had sought to distance itself from the 'low culture' of *hanmai*. In early 2018,

48 Quoted in Kenrick Davis 30 January 2018 'China's Hip-Hop Haters Turn Their Ire to "Hanmai"', *Sixth Tone*. https://www.sixthtone.com/news/1001631/chinas-hip-hop-haters-turn-their-ire-to-hanmai

49 Quoted in Fan 2020.

> the State Administration of Press, Publication, Radio, Film and Television (SAPPRFT) released a notice that specifically mandated that TV programmes were not permitted to broadcast tattooed artists or any representatives of hip hop culture, subcultures or 'dispirited culture' (*sang wenhua*). Popular rappers from *The Rap of China* were banned from appearing on public television.[50]

The policy was part of a broader effort to regulate online content in general and livestreaming content in particular, with platforms like Kuaishou especially hard-hit: 'by the end of May 2018, Kuaishou publicly announced that they had removed nearly 700,000 video clips and blocked almost 200 accounts every day since early April due to "vulgarity."'[51] Later that year, MC Tianyou was personally targeted in a special exposé on the livestreaming industry by current affairs program *Focus*, which claimed that he promoted drug use – both because his lyrics regularly mentioned drugs and because he'd made the mistake of talking about his cravings for meth in one of his livestream sets the previous year. In response, he had all of his accounts systematically banned and his songs scrubbed from the Chinese internet.[52] While rappers have since been allowed back on air after reforming their lyrics and appearance, the same has not been true of many *hanmai* MCs.

Nonetheless, the livestreaming industry itself has thrived – its total revenue was estimated to have reached nearly 180 billion USD by 2022 – though the main beneficiaries have not been rural content creators, nor even up-and-coming tech firms in northeastern cities like Shenyang, but instead the companies that own the major platforms, all of which are located in established metropolitan hubs like Hangzhou, Beijing, and Shenzhen.[53] Recent attempts to formalise and tax the industry in the wake of its breakneck expansion during the pandemic have only reinforced these inequities.[54] The firms involved mostly make money

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50 Xu and Zhang 2020, p. 336.

51 Hou Jiaxi 6 September 2021 *First Monday*, 26 (9). https://firstmonday.org/ojs/index.php/fm/article/download/10587/10219

52 Ibid.

53 Yi Wu 1 September 2022 'China's Livestream Industry: Market Growth, Regulation, Enabling Technology, and Business Strategies', *China Briefing*. https://www.china-briefing.com/news/chinas-livestream-industry-market-growth-regulation-enabling-technology-and-business-strategies/

54 Qu, Tracy 8 December 2022 'Alibaba wants to groom 200,000 influencers in live-streaming e-commerce amid growing competition and weak economy', *South China Morning Post*. https://www.scmp.com/tech/big-tech/article/3202582/alibaba-wants-groom-200000-influencers-live-streaming-e-commerce-amid-growing-competition-and-weak

from advertising, mining, and marketising data, or by charging for access and taking a cut from online sales. For example, on the eve of the livestream boom in the early 2010s, YY had two major revenue sources aside from advertising (which accounted for 20 percent of its revenue in 2012): first, renting space to developers on its gaming portal (Douwan.com) and taking a cut from in-game sales (about 45 percent of its revenue); and second, selling virtual goods that could be gifted to musicians by their fans on its music platform, with the musicians receiving a portion of the money and the firm taking the rest (accounting for roughly 35 percent of revenue). This was the model that the firm would then apply to its livestreaming service.[55] Streamers like MC Tianyou were able to make money on YY Live because fans could purchase digital items such as 'roses' or 'cars' to donate, with their donation visible in the stream's chat and with major donations often receiving a shout-out from the streamer. Just like its revenue model in the gaming and music sector, YY was able to profit by taking a cut from these in-stream purchases. Meanwhile, larger firms like Alibaba were able to integrate their pre-existing ecommerce infrastructure with livestreaming to allow viewers to make in-stream purchases of real goods being advertised by the streamer.

Much as the first internet boom sculpted the illusion of a 'postindustrial' society founded on 'immaterial' labour, so too has China's tech boom generated its own mythic counterpart. On the one hand, this is visible in a particular subgenre of clickbait journalism – international communist collective Chuang has dubbed it 'Dark Sinofuturism' – which emphasises all the ways that technology empowers surveillance (as if this were somehow more true in China than elsewhere), amplifies the 'myth of totalitarian omnipotence' that enshrouds the Chinese state (disguising the persistent weakness of the central government), and demonstrates to death the banal fact that the tech industry is actually fuelled by massive inputs of low-wage labour (as in the case of the workers tasked with training AI systems or moderating social media content).[56] Even when authors emphasise similar inequities in the tech industry elsewhere or stress that Chinese workers are inset into global value chains, their undue emphasis on exceptional-but-illustrative cases nonetheless tends to obscure

55 Geron, Tomio 11 June 2012 'YY.com: China's Unique Real-Time Voice and Video Service With a Virtual Goods Twist', *Forbes*. https://www.forbes.com/sites/tomiogeron/2012/06/11/yy-com-chinas-unique-real-time-voice-and-video-service-with-a-virtual-goods-twist/?sh=1be949eb43d1

56 Chuang 2021a 'State of the Plague: Chuang with Aminda Smith and Fabio Lanza', *The Brooklyn Rail*. https://brooklynrail.org/2021/09/field-notes/The-State-of-the-Plague

the average under a flood of voyeuristic vignettes mined from the outliers.[57] This then generates the classic orientalist trope of an exotic and threatening China where all the social problems that plague the West are reflected and inflated to monstrous proportions. In contrast to this exceptional image, both the reality and the ideology of the Chinese tech industry are merely iterations of a global norm, just as the abject landscape of the northeastern rustbelt is a fractal mirror of the many other rustbelts scattered across the planetary hinterland. Dark sinofuturism represents little more than local class anxieties displaced onto familiar racial tropes – all made digestible within an increasingly sinophobic media culture, where these very outliers become a valuable ore to be processed into fearmongering tales of facial recognition fused to a 'neofeudal' state.

On the other hand, the tech boom has also been accompanied by an equally ideological nostalgia for a mythic rural life. In the same years that the grim hinterland comedy offered by *hanmai* MCs and left-behind youth in the countryside was gaining popularity, there also emerged a very different subgenre of content creators who specialised in curating a fictitious facsimile of antiquated rural life for consumption by a wealthier urban audience – part of a more general trend of retro-nostalgia called *fugu* (复古, from a Confucian adage that means 'to return to old ways') which encompasses both the fantasy web-novel renaissance from which *hanmai* drew lyrical inspiration and more specific hobbyist trends such as the revival of traditional *hanfu* clothing. Among the most prominent of these *fugu* influencers has been Li Ziqi, who specialises in ethereal, mostly dialogue-free vlogs in which she shows simple rural handicrafts, harvests crops, gathers wild plants, rides horses, and demonstrates rustic cooking. In one video, 'Li spends her morning riding through a misty forest on horseback, collecting magnolia flowers in a wooden basket' and then 'returns to cook the flowers on a traditional stove fueled by dry hay, preparing magnolia pastries from scratch.' In these videos, Li appears to live 'a peaceful, enviably pastoral

57 A particularly well-known example is the work of American tech-worker-turned-geographer Wang Xiaowei, whose award-winning book *Blockchain Chicken Farm and Other Stories of Tech in China's Countryside* (New York: Macmillan, 2020) works through a series of ethnographic cases examining the impact of various tech industries in rural China. Though often informative, Wang's account does not adequately scale these trends against the average, inadvertently committing an atomistic fallacy by falsely generalising the exceptional trends documented in a few locations to rural China as a whole. In contrast, social scientists who have spent decades studying development in rural China tend to emphasise the far more substantial impact of conventional trends long visible in the global agricultural and extractive sector, such as the transition to factory-farm production in the pork industry. For example: Schneider 2017.

PHOTO 10 In one of her most popular videos, Li Ziqi harvests wool from lambs to make a winter cloak. Citation: Li Ziqi, '[Lamb Wool Cloak] Use soft lamb wool to knit a cloak to stay away from winter wind and snow.' | Liziqi

life' that is 'off the grid and entirely self-sufficient' with no modern appliances. As the saying goes, 'not a cell phone in sight' – though of course there is always one behind the camera. While Li is the most famous, similar styles of *fugu* content have been produced by other rural vloggers, often with slightly different points of emphasis, as in the videos of Yunnan-based producer Dianxi Xiaoge, who focuses on traditional cooking methods, or Hunan-based vlogger Xiangye Yatou, a member of one of China's officially recognised ethnic minority groups who promotes tourism and markets honey and chrysanthemum tea produced in her village.[58]

In reality, figures like Li Ziqi are little more than corporate brands popularised by the (both Chinese and American) tech platforms that host their videos, as well as the state itself, which has hailed Li as an ambassador for traditional Chinese culture. This is not to say, however, that there is no kernel of authenticity to the performance. In fact, the entire brand is built on the entrepreneur's claim to authenticity, albeit one that differs from the idyllic image presented onscreen. Li was born Li Jiajia and, after the divorce of her parents and the death of her father, she was raised by her grandparents in rural Sichuan. As a teenager in the early 2000s she dropped out of school and moved to one of the

58 Liu Yiling 1 November 2021 'She drew millions of TikTok followers by selling a fantasy of rural China. Then politics intervened', *rest of world*. https://restofworld.org/2021/tiktok-china-influencer-liziqi/

province's largest cities where she suffered regular stints of homelessness and worked a series of jobs across the service sector, sending most of her earnings back home to support her family. After nearly a decade as a migrant worker, she then moved back to her rural hometown to take care of her sick grandmother in 2012, opening a TMall store to sell local goods online. Soon after, she began posting videos on Meipai, the Chinese equivalent of Instagram, hoping it might help sales.[59] After hiring a production team, she gradually refined her style and began posting to Weibo and, later, Douyin and YouTube, soon gaining millions of followers in China and beyond. In addition to monetising the video content itself, Li's affiliated ecommerce businesses boomed, offering everything from prepackaged Sichuan hot pot mixes and river snail rice noodles to her own brand of scented candles, all of which have since 'become so popular that the brand announced plans to build factories just to produce them in bulk.' Meanwhile, though Li was both star and director of her videos, 'the Li Ziqi empire itself had been powered by an army of workers who keep production oiled and running within Hangzhou Weinian,' the tech incubator and influencer-management agency that owned a majority share of Li's business (incorporated as Sichuan Ziqi Culture Communication) and oversaw both her social media account and food brand.[60]

The fourth wall was briefly broken in 2021, however, when an intellectual property dispute broke out between Li and Weinian, with Li filing a lawsuit against the Hangzhou company and refusing to upload new content for nearly a year, until the suit was resolved in Li's favour in 2022.[61] In 2023, she then reappeared on social media, acting in a semi-official capacity 'as an ambassador for the China Association of Young Rural Entrepreneurial Leaders, a nonprofit organisation founded by the Communist Youth League in 1988 to promote business ventures in the Chinese countryside.'[62] Her disappearance and return – in contrast to the more permanent deplatforming of major *hanmai* streamers – is itself a demonstration of Li's ideological consistency with the very tide of mod-

59 Colville, Alex 27 July 2020 'Li Ziqi, the new face of China's countryside', *The China Project*, 27 July 2020. https://thechinaproject.com/2020/07/27/li-ziqi-a-reclusive-country-vlogger-who-became-an-online-celebrity/

60 Liu 2021.

61 Feng, Coco 28 December 2022 'Li Ziqi, once China's hottest YouTuber, set for return after settling legal dispute with agent Weinian', *South China Morning Post*. https://www.scmp.com/tech/article/3204851/li-ziqi-once-chinas-hottest-youtuber-set-return-after-settling-legal-dispute-agent-weinian

62 Feng, Jenny 28 September 2023 'Chinese YouTube star Li Ziqi is back. But can she beat her copycats?', *The China Project*. https://thechinaproject.com/2023/09/28/chinese-youtube-star-li-ziqi-is-back-this-time-she-has-imitators-to-beat/

ernisation that her aesthetic appears to oppose. Ultimately, Li and other rural *fugu* influencers provide little more than 'a fabricated experience of rurality for burned-out urbanites.'[63] In this respect, they retread a well-worn path in art history, wherein the experience of rapid industrialisation tends to be accompanied by a proliferation of pastoral artforms that both react against the new urban reality and help to obscure it from view, as in the emergence of Romanticism in Europe or the Hudson River School in the US. These artforms then become attached to alternately utopian and conservative political currents, representing an idealistic escape from society or wholesome return to tradition in the face of widespread social anomie. Rather than bridging the rural-urban gap, these artforms are more often used in a fashion that further reinforces it.[64]

At the more practical level, Li's videos have become part of a broader marketing campaign (similar to the woke-washing of US corporations) in which Chinese tech firms have attempted to portray themselves as supporters of state-sponsored poverty alleviation and rural revitalisation efforts. Ironically, some of the earliest examples of this branding effort were the tongue-in-cheek jokes by *hanmai* streamers asking for donations in the name of alleviating rural poverty. After suffering under the new regulations, major platforms like Kuaishou then revived the theme in earnest, launching a rural development project called Happy Countryside, starting a social impact institute to 'support the development of sustainable businesses for entrepreneurs hailing from low-income households,' and producing in-depth reports on poverty alleviation. In preparation for a lucrative international IPO, the company heralded its economic impact in terms designed to appeal to regulators:

> Users from impoverished rural backgrounds were said to have made 2.8 billion USD in revenue on Kuaishou in 2018, and among the 25.7 million users that earned income on the platform from June 2018 to 2019, over one-fourth were in rural areas. A large percent of that revenue has come from livestreamed ecommerce.[65]

Soon, similar language began to be incorporated in official documents and reporting by state-owned media, which explained how livestreaming could be used to reinforce national identity, alleviate rural poverty through direct

63 Liu 2021.

64 Li Han June 2020 'From Disenchantment to Reenchantment: Rural Microcelebrities, Short Video, and the Spectacle-ization of the Rural Lifescape on Chinese Social Media', *International Journal of Communication*.

65 Meng 2021.

donations, and better integrate markets for agricultural products via ecommerce.[66] Li even seemed to mobilise the same themes in her lawsuit against Weinian, claiming in an interview with state media outlet CCTV conducted right before her hiatus that she 'does not want to see her intellectual property over-commercialised'[67] and instead hoped to assist in rural revitalisation and the building of 'common prosperity' (another policy slogan), helping to 'guide youth' toward 'positive energy' and even thinking of herself 'as a new socialist farmer.'[68]

4 Exit

Ultimately, though, the popularity of this new pastoralism exceeds its appropriation by corporate marketing campaigns and state planners. Despite its falsity (of which most viewers in China are well aware) Li's rural fantasy models a sort of affected asceticism that has proven especially appealing for overworked urban professionals. After all, the same years also saw growing unrest among white collar workers, homeowners, various petty capitalists, and other segments of the middle strata – those layers of the proletariat with higher wages, on average, who are also able to bolster their income with various non-wage rents, such as income from assets like real estate or stocks, or from minor profits earned via businesses. Maybe the most widely reported of these were the protests among employees at tech companies forced to work the notorious '996' schedule (9am to 9pm, 6 days a week). Distributing underground literature and setting up informal chatrooms on the programming platform GitHub, tech workers made contact with one another, documented abuses at various companies, and pointed out that the schedule was illegal according to official labour laws. The worst offenders were many of the largest ecommerce firms such as Alibaba and JD.com, major software companies like Bytedance, and ascendant domestic smartphone brands like Huawei and Xiaomi.[69] While mobilisations

66 For example: Zheng Tianqi 26 August 2021 'Live e-commerce plays an active role in helping rural revitalization', *China Daily*. https://www.chinadaily.com.cn/a/202108/26/WS6126fe3ba310efa1bd66b475.html

67 Wang Hai 27 October 2021 'China's Most Famous YouTuber Li Ziqi Sues Partner firm Weinian', *Yi Cai Global*. https://www.yicaiglobal.com/news/chinese-youtube-celebrity-li-ziqi-sues-mcn-partner-weinian-after-three-month-silence

68 Liu 2021.

69 Xue Yujie 28 March 2019 'Chinese Developers Protest Overwork on GitHub', *Sixth Tone*. https://www.sixthtone.com/news/1003771/chinese-developers-protest-overwork-on-github

against these gruelling schedules helped to bolster the government's efforts to crack down on a hyper-speculative tech industry that had begun to expand beyond any regulatory control, the new legal guidelines and the high-profile snubbing of tech magnates such as Jack Ma in the early 2020s have only resulted in minimal changes or mixed results for tech workers themselves, since the cancellation of policies like forced overtime have not been accompanied by pay raises or reduced workloads.[70]

Protests by homeowners also increased throughout the latter half of the 2010s as the rapid inflation of the housing bubble began to strain. In China, it is extremely common for individuals to buy units in new developments well ahead of construction being completed, with buyers often using their (or, frequently, their parents') life savings to make the purchase. In a typical case, protests are triggered after the bankruptcy of a real estate firm leaves a residential development unfinished or when developers deliver a substandard finished product that lacks many of the originally advertised amenities. Protests thus focus on the legal liability of the real estate firm and, sometimes, the complicity of local governments.[71] By 2022, as unrest expanded in the wake of cooling real estate prices, a viral campaign emerged online encouraging homeowners to go on a 'mortgage strike' by boycotting payments until developers delivered on unfinished projects. Some of these projects had already been stalled for years, while others had not even seen ground broken, all despite mortgage-holders having put down substantial cash up front, making regular monthly payments thereafter. By July of that year, some 35 projects in 22 cities were affected.[72] By November, 340 strikes were reported in over 100 cities. The very inland cities that had seen the largest booms were the most affected – with Zhengzhou, Wuhan and Changsha leading the rankings. Even though those boycotting their payments risked tanking their credit and losing their life savings, they were confronted with few other options.

In one typical case, an engineering consultant in his early thirties with a wife and small child had waited two years for the apartment he'd purchased to be completed. Meanwhile, his employer had cited COVID disruptions to cut his salary by one third, to roughly 10,000 RMB per month (in other words, about the same as a better-paid warehouse worker). He explained the mortgage strike

70 Lu Shen 28 July 2021 'China's era of Big Tech Overwork has ended', *protocol*. https://www.protocol.com/china/china-996-overtime-era-ended

71 Chuang 2019b.

72 Niu Mujiangqu and Han Wei 14 July 2022 'Homebuyers in Multiple Cities Go on Mortgage Strike Over Delayed Projects', *Caixin Global*. https://www.caixinglobal.com/2022-07-14/homebuyers-stop-making-payments-on-delayed-projects-101912692.html

tactic in blunt language: 'It's like breaking your arms to survive – we clearly understand the consequences.' In the same complex, another homeowner had made a 300,000 RMB down payment on a 900,000 RMB unit, with 4,000 RMB monthly payments thereafter. When the striking homeowners attempted to track where these payments had gone after years of stalled construction – their apartment towers little more than concrete shells – they'd found that 'the presale funds were transferred into the developer's own accounts instead of the escrow account [supervised by local authorities] specified on the housing purchase contract.'[73] While this might seem like an exceptional case, the reality is that many successful developers had long done the same thing, pilfering cash and leveraging land to secure massive loans. This worked well while the real estate bubble was inflating. Under such conditions, only particularly inept, corrupt, or unlucky developers were unable to turn a profit. However, when the growth of real estate prices began to slow and then reverse, firms increasingly found themselves unable to keep up on payments to creditors and construction partners.

At the broader level, all of these high-intensity, low-reward systems began to stoke an emerging countercultural discourse that spanned the experiences of otherwise disparate social strata. An obscure academic term soon gained popularity as a description for this conundrum: involution (*neijuan*, 内卷). The concept originated among scholars studying the history of agrarian societies in Asia and attempting to explain why such societies experienced increasingly limited economic returns and fewer technical breakthroughs despite the growing complexity of agricultural production and the commitment of increasing amounts of labour to farming.[74] Basically, the situation was one in which added labour was squandered – each unit consuming more than it added in output – such that these societies were, at best, stuck in a state of stagnant equilibrium or, at worst, trapped in a slow downward spiral where the investment of more and more resources was necessary just to maintain a steady state. In the current context, young people from a wide range of professions have begun to use the term to describe the feeling of being stuck in an inescapable cycle despite the constantly increasing investment of time and money needed to just main-

73 Luo Meihan, 29 November 2020 '"No Way Out": Why China's Mortgage Strikers Refuse to Back Down', *Sixth Tone*. https://www.sixthtone.com/news/1011767/no-way-out-why-chinas-mortgage-strikers-refuse-to-back-down?source=recommend

74 The term was coined by anthropologist Clifford Geertz, in a study of Java. But it was introduced to the Chinese context by economic historian Philip C.C. Huang, in his 1990 book *The Peasant Family and Rural Development in the Yangzi Delta, 1350–1988*, Redwood City, CA: Stanford University Press.

tain the momentum of that cycle itself.[75] The anxiety applies as much to the plight of parents seeking to guarantee their child's future as to that of university students locked in intensive competition over GPAs, tech workers forced into extreme overtime, factory workers stuck in the endless turnover of the production line, and couriers being literally driven to death. The very popularity of the term therefore hints not just at a breadth of interpretation but instead signals how the 'new normal' of slow growth rates and narrowing profit margins has become entrenched in a cynical anxiety spanning social strata.

Following in the footsteps of the earlier youth rebellions that accompanied similar waves of slowing growth and deindustrialisation in the US, Europe, Japan and elsewhere, many have therefore responded to the pressures of involution in a familiar fashion: by embracing a bohemian ethic that glorifies dropping out and finding new forms of subsistence in the margins of society. This is where the rural idyll of Li Ziqi takes on its broader social function, offering a 'vision of actually-existing personal deindustrialization – exit from the city, the embrace of subsistence agriculture, and disconnection from state apparatuses,' all able to thrive in the imaginations of an otherwise diverse audience precisely because of 'its lack of a circumscribed political or social program.'[76] On its own, Li's vlog remains little more than an easily-consumed fantasy for overworked urban professionals. However, recent years have also seen a proliferation of small-scale attempts to actualise just such an escape from the system. Exit takes many forms. At the extreme are the thousands of young people who have flocked to holy sites like the Zhongnan Mountains to connect with the hundreds of modern-day hermits who live on the mountainside in illegal dwellings, tending unofficial Buddhist and Taoist temples. Often, the journey is fraught and dangerous. As one hermit recounts: 'some kids come here in winter, wearing just one layer and worn shoes … You might be destined to meet a good master, or you might be destined to die on the mountains.'[77] As these hermitages grew more popular, the local government began to demolish illegal structures and pressured hermits to register their temples.[78]

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75 Wang Qianni and Ge Shifan 4 November 2020 'How One Obscure Word Captures Urban China's Unhappiness', *Sixth Tone*. https://www.sixthtone.com/news/1006391/how-one-obscure-word-captures-urban-chinas-unhappiness

76 King, Dylan Levi, 9 April 2021 'China's Exit to Year Zero', *Palladium*. https://www.palladiummag.com/2021/04/09/chinas-exit-to-year-zero/

77 Quoted in Lin Qiqing, 3 May 2019 'The Hermit Culture Living On in China's Misty Mountains', *Sixth Tone*. https://www.sixthtone.com/news/1003932/the-hermit-culture-living-on-in-chinas-misty-mountains

78 The country has also seen a new generation of digital nomads skilled in exploiting the overproduction of real estate in hinterland cities to pay bargain basement rent for sea

A similar phenomenon is also visible among lower-strata workers such as the 'Sanhe Gods' (三和大神) of Shenzhen's Jingle Market,

> a precarious ecosystem of day-labourers, recruitment agencies, cheap hostels, noodle stalls, and Internet cafés (serving the dual purposes of entertainment and 'accommodation' in the form of comfortable gaming chairs that can be accessed at any time of the day or night for the minimal cost of internet usage fees).[79]

The philosophy of the semi-homeless 'gods' is to 'work one day and play for three' (干一天玩三天), taking jobs in informal 'black factories' that pay less than the minimum wage and violate safety standards until the conditions become unbearable, then quitting to scrounge off whatever they were able to save. Among migrants in the lowest-wage sectors, the act is known as 'picking up the bucket and running' (提桶跑路), since such workers often own little more than a red bucket that they take from site to site, packed with their belongings. In 2019 and 2020, the practice became the focus of a tongue-in-cheek social media challenge – recorded with the hashtags #FactoryLife (#工厂生活) and #LiftTheBucket (#提桶) – in which migrant workers documented the abysmal conditions of factory labour on livestreaming platforms and microblogs, '"challenging" each other to see how long they could last at their jobs before grabbing their buckets and looking for better work.'[80] Eventually Jingle Market was targeted for redevelopment, its cheap hostels demolished, labour contractors run out, and regulations put in place to shut down internet cafes after dark.[81]

But by far the best-documented aspect of this new bohemian culture has been the popularity of *tangping* (躺平) or 'lying flat.' While other forms of internet discourse had garnered a similarly alarmist response – such as the rise of *sang* culture (丧文化), which praised attitudes of disaffection and disen-

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views, living a beach bum life subsidised by drone photography and livestreamed seaside strolls on the islands of the coast of Guangdong. (Jiang Xinyi and Fan Yiying 13 September 2022 'The Winners of China's Housing Bust: Burnouts and Beach Bums', *Sixth Tone*. https://www.sixthtone.com/news/1011211/the-winners-of-chinas-housing-bust-burnouts-and-beach-bums)

79 Whitworth, Katherine 2021 'The Sanhe Gods,' *The China Story Yearbook 2021: Contradiction*. https://www.thechinastory.org/yearbooks/yearbook-2021-contradiction/focus-labour/the-sanhe-gods/

80 G, 24 September 2020 'Scaling the Firewall #1: #LiftTheBucket', *Chuang Blog*. https://chuangcn.org/2020/09/liftthebucket/

81 Witworth 2021.

gagement – *tangpingism* seemed able to condense an otherwise amorphous spirit of social rebellion into a single, easily transmissible meme. More importantly, it implied a shift away from the endlessly online world where neologisms are coined each year to describe the same simmering discontent to an offline practice defined by rejecting the hassle of a career and instead scraping by on minimum effort while seeking some sort of authentic experience in travel, art, and philosophy. In other words, it designated a shift from affect to action, however vaguely defined. The author of the original forum post that coined the term described how years of unemployment had opened his eyes to the futility of both striving for success and raging against society. In contrast, he posed the philosophy of as a sort of romantic humanism: 'Since there has never been an ideological trend exalting human subjectivity in our land, I shall create one for myself: Lying down is my wise movement. Only by lying down can humans become the measure of all things.'[82]

Similarly, a later 'Tangpingist Manifesto' counterposed the movement to the very productivity that had placed China at the centre of the planetary factory:

> in the past, the people here have always been the most exemplary producers. Few other social factories in the world can make machines that run this smoothly, without making a single sound, as if the machine itself is a kind of void, without any friction. As if the people themselves were a void, and the nation was a form of reality miraculously snatched from the void.[83]

Against the expanse of empty machines, the author poses *tangping* as a radical reorientation rooted in ruthless opposition to the entirety of the existing world:

> … from the moment they lay down, the Tangpingist's body was already outside the country. Not only does their existence constitute another ethnic group, but the land on which they lie becomes completely detached from the old country … The body has no connection to possession and distribution, and the land is uninterested in management and governance. A radical Tangpingism marks a complete rejection of the current order …

82 Quoted in Zhang Wanqing and Liu Mengqiu 27 May 2021 'Tired of Running in Place, Young Chinese "Lie Down"', *Sixth Tone*. https://www.sixthtone.com/news/1007589/tired-of-running-in-place%2C-young-chinese-lie-down

83 Anonymous Tangpingist 2021 'Tangpingist Manifesto: Tangpingists of the world, unite!', *The Anarchist Library*. https://theanarchistlibrary.org/library/anonymous-tangpingist-manifesto

> Just rotate the world 90 degrees, and people will discover this unspoken truth: the one who lies flat is standing.[84]

However, despite the emphasis on subjectivity and a sort of philosophical revolt, the author presents *tangping* not as an atomised practice of 'reclusive and withdrawn' asceticism – which, they argue, is actually just a form of governing the labour market by maintaining a relative surplus population – but instead as a form of communal secession. Diogenes is rendered into something like the patron saint of the movement: 'He did not shy away from advocating his ideas to passersby, and he placed his wooden barrel in the most prosperous road in the centre of the ancient Greek world.' Similarly, *tangpingists* 'lie down on the highways where the traffic flows, in the factories where the machines run and the bodies are numb.'[85]

Throughout, *tangping* is portrayed as evoking a universal appeal that cuts across social divisions, attracting 'peasants and nomads' and 'women and queer people' as much as 'students and intellectuals,' with the activities of *tangpingists* performed not for themselves 'but for all the oppressed.' In terms of practical application, however, the author settles on a well-trod formula more or less identical to the utopian programs of mass exodus and countercultural detachment that accompanied deindustrialisation elsewhere, advocating for the formation of 'alternative autonomous communities' where 'mutual aid and communal relationships' can proliferate under a system of 'collective governance with direct democracy and gender equality.' Vague references are made to the usual litany of historical examples: the Paris Commune, maroon communities such as that of the Great Dismal Swamp, the German squatter movement, and the ongoing struggles of the Zapatistas and Kurds. No attempt is made to engage with the actual history of such events, which remain little more than flimsy backdrops framing the grand and tired melodrama pitting enlightened bohemians against bureaucratic sheep. Though ostensibly communal, the conservative contours of such fantasies are always visible in their appeal to an idealised form of individuality unstructured by social imperatives and therefore perfectly capable of choosing to exit the system at will, with this exit often portrayed as the return to some sort of authentic, non-alienated human existence, reconstituting a violated natural order.[86] For example, the manifesto portrays the individual *tangpingist* as 'the smallest autonomous

84 Ibid.

85 Ibid.

86 This very notion is, of course, the expression of a real alienation experienced in concrete ways within a society that actively obscures the very existence of basic social relationships

region,' framing the entire political enterprise in voluntaristic terms and never addressing rudimentary questions of subsistence or the threat posed by state power.[87] Not coincidentally, rumour has it that the author of the manifesto attempted to found their own *tangpingist* commune on the outskirts of Beijing only to be halted by authorities.

5 Mould on Glass

Ultimately, even while it condenses and communicates a certain spirit of rebellion, *tangpingism* proves to be just as much a fantasy as the ethereal paradise of Li Ziqi. Like the characters in Geng's films, we find before us a wasteland where the only way to survive is to rob and be robbed in the endless cycle of involution. *Tangping* merely suggests, at best, that we might strive to rob less or at least more lightly – thieves sharing meals and the middling warmth of coal stoves that hardly hold back the outer cold. At worst, utopia is a gentle poison offering brief but blissful reveries. These fantasies, however, are not simply falsehoods. They are instead the subjective expression of objective trends in the geographic and technical structure of production, which is simultaneously the sculpting of the population through the systematic deskilling and reskilling of the proletariat and the construction of a built environment designed to house and channel value, with human beings little more than its ancillary bearers. The deindustrialisation of employment occurs alongside – is, in fact, driven by – a general industrialisation of the planet, which first dissolves the direct interface with local ecosystems and then systematically disintegrates the productive knowledge that arises in this gap and re-elaborates it in a form amenable to the creation and appropriation of value. The objective global landscape of value therefore reappears at the subjective level as a simultaneously 'general' or 'universal' productive scientific knowledge that is monopolised by a small fraction of the population – their very existence the product of large-scale and heavily subsidised institutions tasked with social reproduction and their knowledge actively subordinated to the law of value through a combination of social domestication and discipline within the firm – and the 'degraded' or 'mutilated' subjectivity held by the majority and defined by partial knowledge and limited access to these broader skills.

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and thereby generates the idea that subjectivity as such is an attribute that emanates from asocial individuals.

87 Anonymous Tangpingist 2021.

Geng's films provide a particularly acute picture of such mutilation because they portray the abjection of those forced to subsist outside the sphere of industry but still bound by the economic laws of capitalist society. Fantasies of utopian exit express much the same condition, only viewed from the perspective of those whose productive subjectivity has suffered degradation, rather than outright mutilation. It is no coincidence, then, that both virtual fantasies of an idyllic rural life and more radical forms of bohemian separatism – Li offering the theory and *tangping* the practice – have accompanied the deindustrialisation of employment across the sunbelt. After all, this was precisely the pattern witnessed in previous cycles of development. It also seems to be a somewhat organic outcome of political defeat, since crushed strike waves and stifled insurrections pose few options aside from retreat. While this retreat may be necessary, the utopian error is to misread it as an intentional strategy of secession that ingeniously outflanks the enemy by refusing to build power and thereby evading the trap of politics altogether.

The disintegration of revolutionary subjectivity is therefore founded on a deeper fragmentation within the productive consciousness of the collective worker, reproduced at both the planetary and the regional scales. As the complexity of the production process increases, ever-larger gulfs seem to open within the general intellect and to expand in proportion with the increasing social scope of production.[88] The degradation and outright mutilation of productive subjectivity are necessary outcomes of the automation and ongoing subdivision of labour within capitalism.[89] But they are only necessary in a social sense – which is to say necessary to the accumulation of capital – not a technical one. In contrast to that old image of the industrial worker endowed with a revolutionary mission by the very development of the productive forces, today the figure of the goods-producing worker has been pushed so far out of sight and mind for so much of the general populace that almost any reminder of the existence of the labourers who create society's material substratum has the

88 These gaps are explored in detail by communist engineer Nick Chavez, as in: October 2021 'The Present and Future of Engineers', *The Brooklyn Rail*. https://brooklynrail.org/2021/10/field-notes/THINKING-ABOUT-COMMUNISM

89 This issue has been at the centre of discussions on the role of logistical systems and their potential reconfiguration: Bernes, Jasper 2013 'Logistics, Counterlogistics and the Communist Prospect', in *Endnotes 3: Gender, Race, Class and Other Misfortunes*, 2013. https://endnotes.org.uk/articles/logistics-counterlogistics-and-the-communist-prospect; Toscano, Alberto 9 August 2011 'Logistics and Opposition,' *Mute*. https://www.metamute.org/editorial/articles/logistics-and-opposition; Chavez, Nick December 2022 'Technical Expertise and Communist Production', *The Brooklyn Rail*. https://brooklynrail.org/2022/12/field-notes/Technical-Expertise-and-Communist-Production

power of a sudden and fast-forgotten revelation repeated *ad infinitum* in new scandals featuring seamstresses crushed in collapsed factories, toxic clouds exploding from derailed train cars, child slaves harvesting chocolate, or some new species of horrible (and of course perfectly preventable) illness spreading among farmworkers. Most proletarians instead find their own daily life dominated by informal gig labour and various other 'bullshit jobs,' or by meaningful work in the reproductive services where the social character of the occupation is visible (and visibly distorted by the profit motive) but its connection to the broader metabolic process is obscured.[90]

While it is common to attribute these failures to leftist subcultures in the wealthy countries or obscure academic perspectives – both scorned for their distance from 'real workers' of some sort – the phenomenon is just as global as the deindustrialisation that drives it. For example, after the insurrectionary occupation of Colombo, Sri Lanka, which peaked with the storming of the presidential palace in the summer of 2022 (followed by a minor reshuffling of power), the more radical participants in the insurrection turned to precisely these sort of romantic communitarian illusions of separatist self-reliance that plague 'the left' elsewhere.[91] In response to the question of what political path to pursue after the collapse of the occupation, one local organiser responded:

> We are looking into other modes. Not of dissent, but of revolutionizing life by moving out of the system; to create these off-grid, self-sustained communities, where we can grow our own food and self-govern. We have been swept along and inspired by our comrade's idea to start a plant-based permaculture off-grid living community, so we can get away from the system and, with the impending food crisis, we can grow our own food and live in harmony with nature, using eco-friendly sustainable building methods.[92]

90 The idea of 'bullshit jobs' comes from anarchist anthropologist David Graeber, who argues that roughly half of occupations in the average high-income country are essentially pointless (*Bullshit Jobs*, New York: Simon & Schuster, 2018).

91 At the same time, the established leftist organisations (built up around parties like the People's Liberation Front (JVP) and affiliated unions) were hardly any better, capitulating as soon as the shift in administration was announced, their position justified in populist terms that appealed to the ethnic Sinhala majority and drew from a naïve instrumentalist view of the state and ensuing questions of political power.

92 Anonymous 10 August 2022 'Dispatches from Sri Lanka', *Ill Will*. https://illwill.com/dispatchs-from-sri-lanka

Rather than a first-world problem, then, the utopian path-of-least resistance is itself an ideological limit generated by the technical complexity and social subdivision of labour accompanying the increasing mechanisation of production and its coordination at ever-larger social scales. In other words, the occlusion of such knowledge is an outcome of both the material reality of production and the ensuing degradation and mutilation of productive subjectivity *at the planetary scale*, which endows production with an opacity that proves difficult to perforate even in moments of expansive social upheaval.

Within contemporary class struggle, this limit manifests as a sort of 'glass floor' dividing the frequent riots, insurrections, and even massive strikes in various social reproductive sectors from the productive sphere beneath.[93] In such conditions, new and unfamiliar forms of utopianism arise in what initially seem to be familiar forms. After all, the *tangpingist* notion of 'alternative autonomous communities' appears to simply regurgitate the well-established countercultural cliché of urbanites decamping to rural communes, which itself seems to be a distant but direct ancestor of the utopian socialisms critiqued by Marx himself and visible in any number of intentional communities founded at the frontiers of the settler colonies of the eighteenth and nineteenth centuries. This familiarity is reinforced by a series of shared themes: political voluntarism, spiritual or philosophical awakening, the romantic myth of returning to more 'natural' forms of community, and, above all, an emphasis on local subsistence. In the extreme, these experiments claim to be building a basis for self-reliance and thereby enabling a full secession from society. In many such cases, they may even take on a millenarian character that comes to be seen as a legitimate threat by state authorities – as occurred with the Mormons, whose origins trace back to what was essentially a run-of-the-mill utopian socialist sect in the nineteenth century US.

But there are equally decisive differences between the classical and contemporary case. The utopian socialisms of the eighteenth and nineteenth centuries modelled their productive schemes on an idealised image of the worker as artisan and yeoman. For these thinkers, capitalism was, in essence, just feudal domination in a new form. If capitalist encroachment could be pushed back or escaped – to new settlements on the frontier or homesteads in the rural hinterland of the home country – then these more organic forms of industry and agriculture would naturally flourish, forming the basis for an independent workers' republic free from tyranny. For Marx, however, the combined power

93 The term comes from: Théorie Communiste 2009 'The Glass Floor', in *Les Emeutes en Grèce*, Paris: Senonevero. https://cominsitu.wordpress.com/2018/12/18/the-glass-floor-theorie-communiste-2008/#more-7685

of heavy industry and the modern financial, military, and administrative bureaucracy of the state had already made it essentially impossible to establish independent republics of labour by fleeing beyond the system or establishing egalitarian communes in its interstices:

> In these conditions, Marx denies that workers can recover – individually or cooperatively – the independence of the yeomanry, the bulwark of the old-style republic. Instead, any future freedom will have to be the fruit of mutual dependency.[94]

Though there might have been some ambiguity to such a claim in the years when Marx wrote *Capital*, today there is none. Not only is it now impossible to envision how relatively small-scale production would secure anything other than the most abject and fragile forms of subsistence, but the planetary scale of the environmental crisis also quite clearly requires a planetary solution.

The revival of utopian schemes today therefore seems especially strange. On the one hand, both local subsistence and territorial secession are now extremely difficult and, in most places, essentially impossible. On the other, the customary forms of artisanal production and traditional agriculture that were to compose the technical basis of the independent workers' republic have been largely extinguished. Given these facts, it becomes clear that contemporary fantasies of escape are not merely reprisals of the old artisanal utopias critiqued by Marx and Engels. They are instead an entirely new form of alienated subjectivity generated by the very complexity of industry and the exclusion of ever-larger shares of the population from a productive sphere that then appears not only inaccessible but fundamentally opaque. The very idea that workers can simply exit the system is itself only made possible by a pervasive inability to even perceive the workings of the system itself, despite the fact that it churns beneath our very feet.

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94 The remainder of this section from Roberts (2017, p. 192) is worth quoting in full: 'What matters for Marx is that, just as the mass of workers are losing the ability and desire to produce goods in an isolated or artisanal fashion, so financial, military, and administrative institutions have been born possessing the ability and the desire to forcibly destroy independent production wherever it continues in existence or springs up [...] Marx proposed, instead, *a republic without independence*. The development and advance of the capitalist regime, he argues, eradicates every condition of independence. It makes each labourer dependent upon untold others. It destroys the skills necessary for independent production and propagates a taste for good things that can come only from cooperative labour on a massive scale. It also empowers a form of social organization, the state – that can, and is interested to, act intentionally to thwart independence.'

As Amir Hernandez argues, the expansion of society's productive capacities, though led by individual firms, generates a 'growth in density and extension of the alienated network of production and circulation' such that 'cumulative scientific knowledge, technical knowledge, institutional know-how, etc.' come to be embodied 'in the material infrastructure of society.'[95] Echoing our own theme, Hernandez also points out that

> This 'objectified labour' comes in the form of buildings, databases, servers, streets, and supply chains, connected by vehicles and radio waves, logistical and scientific know-how stored in brains … The network's alienated and ad-hoc complexity grows into a labyrinth where everyone, from worker to elite manager, becomes increasingly lost, a structure running away from human control.[96]

It is within the depths of this mouldering labyrinth that today's fragile utopias flower and die in the dark. At root, they are nothing more than aspects of the more general mutilation of productive subjectivity, growing like a mould over the world's productive firmament until its workings are obscured in a blighted veil of green.

6 The Industrial Party

Meanwhile, the complexity of the modern economy also generates a symmetrical, technocratic utopianism that tends to take hold among a certain stratum of credentialled elites, mirroring the dreams of arcadian exit from the opposite angle. According to these thinkers, the labyrinth of production can only be properly navigated by enlightened experts with high-level training in science, technology, and the twin arts of social governance and macroeconomic management. Hernandez argues that this very faith revives the ideological mission of political economy itself, echoing Simon Clarke's description of the field in its classical form in Britain as appealing not so much to early capitalists but 'above all to government ministers and later to their civil servants, for whom political economy offered a universalistic ideology that corresponded to their own pretension to stand above contending particular interest in pursuit of the general good.'[97] Today, the same basic pretension is visible in figures such as Thomas

95 Hernandez 2023.
96 Ibid.
97 Clarke 1988, p. 65.

Piketty and Adam Tooze, who offer detailed accounts of how inequality has arisen, how recent crises have played out, and how both might be addressed if only the more enlightened members of the 'professional managerial class' were empowered to mobilise 'muscular state intervention to address problems that the market is unable to solve.'[98]

But this technocratic trifecta combining the rule of expert elites, aggressive macroeconomic management, and active industrial policy is hardly new. In China, its more radical expression goes under the name 'The Industrial Party,' a term coined in 2011 by the well-known nationalist Wang Xiaodong (who, not coincidentally, studied math and engineering and worked as an economics instructor) as a convenient way to refer to an otherwise heterogenous range of public intellectuals 'who believe that the advancement of technology via industrial development is the most essential element behind human progress,' driving both ideological changes in the populace and determining the fate of countries (especially the less advanced) locked in unending competitive struggles with their (more advanced) rivals.[99] Though often disagreeing on the degree to which the economy should be liberalised, the importance of foreign investment, or the proper extent of state ownership, all these thinkers take as their fundamental goal the question of how best to accelerate industrial development and technological capacities in order to ensure the success of the Chinese nation. They also come from similar backgrounds, as highly educated members of the urban middle strata, usually with degrees in science and engineering. Not coincidentally, they are united in their belief that those with advanced technical knowledge are best positioned to formulate policy.[100]

By the turn of the century, the Industrial Party began to thrive in forums and chatrooms dedicated to debates on statecraft and development. Not coincidentally, these were the same years in which the first generation of revolutionary intellectuals who had helmed the party-state began to give way to a second generation led by bureaucrats with high levels of technical training. Nearly every one of the China's top leaders since Deng Xiaoping's formal retirement in 1989 has been a trained engineer or scientist – Jiang Zemin and Zhu Rongji were electrical engineers, Li Peng a hydroelectric engineer, Hu Jintao a hydraulic

98 Hernandez 2023.

99 Chuang, in the preface to: Yuyan 30 August 2019 'The Wandering Earth: A Reflection of the Chinese New Right', *Chuang Blog*. https://chuangcn.org/2019/08/wandering-earth/

100 Though often characterised as anti-democratic and illiberal, the Industrial Party is better understood as advocating an extremely traditionalist form of democracy, as a form of enfranchisement exclusive to the elite, and expressing a developmentalist liberalism inspired by figures such as Frederick List and Henry Carey, emphasising the necessarily symbiotic role of state and market.

engineer, Wen Jiabao a geologist, and Xi Jinping a chemical engineer – with the sole exception of Li Keqiang, an economist.[101] Though the Industrial Party was initially a marginal online subculture, its resonance with this rising technocracy ensured that the work of these otherwise negligible bloggers would soon begin to garner surprisingly high-profile attention. The trend was only accelerated when industrial policy and state-building again became priorities in the wake of the Great Recession. Though it's unclear whether policymakers had already been familiar with the works of first-generation Industrial Party thinkers or merely reached the same conclusions independently, by the 2010s it became obvious that at least some of the second-generation Industrial Party figures were being read in policy circles. Among these were thinkers such as 'Shenzhen Ningnanshan' (a pseudonym) who claims to work in supply chain management in the southern tech hub, and whose articles have been quoted and translated by state media, with one of his books distributed by a publisher closely linked to the official Communist Party theoretical journal, *Qiushi*.[102] Meanwhile, the basic ideological thrust of the Industrial Party was increasingly visible across popular culture, as is evident in the case of conservative sci-fi authors like Liu Cixin, whose short story about daring scientists strapping giant engines to the planet in order to save it was adapted into one of China's highest-grossing blockbusters.[103]

While it's important not to exaggerate the direct links between such thinkers and those who are actually tasked with crafting policy, it's clear that the two at least operate within the same paradigm. The major difference seems to simply be the prominence that the Industrial Party gives to an extreme, social-Darwinian view of geopolitics and its almost entirely lopsided focus on supply-side dynamics:

> The 'industrial party' bloggers share a lexicon of terms such as 'per capita GDP', 'demographics', 'supply chains' and 'national fortune', which reflects a tendency to think in aggregates and a competitive arena-shaped world view. Their interest in (obsession with) nations, their rise and fall, prosperity and poverty, fill their Weibo/WeChat pages with lengthy, data-heavy accounts of national competition and dominance … Collectively they depict a picture of a merciless ladder called 'development' on which

101 Li Qiang, who succeeded Li Keqiang in March of 2023, combines both, having studied agricultural mechanisation and holding a graduate degree in management engineering and an MBA from Hong Kong Polytechnic.

102 King 2021.

103 Yuyan 2019.

> nations laboriously climb. At the top of the ladder sit countries with the highest per capita GDP, enjoying comfortable privileges, while lower income countries fight to occupy favourable positions underneath.[104]

Such thinkers also tend to be obsessed with financialisation, deindustrialisation, and falling birth rates, posing Japan as both an exemplar of industrial development in the postwar period and, from the late 1980s onward, a cautionary tale of what happens when the industrial engine stalls. Hong Kong is also a frequent reference, with Shenzhen Ningnanshan warning 'the leadership not to pursue the Hong Kong Model of using real estate to "squeeze the common people to make a minority of capitalists extremely wealthy."'[105]

In this regard, the Industrial Party mirrors the concerns of at least some central officials, such as Wang Huning. Former professor of international politics and current member of the Politburo Standing Committee (the highest decision-making body in the government), Wang is widely considered to have played a major role in formulating the official political ideologies of the last three administrations. His own thought – at least as is visible in his published works from his time as an academic, prior to his entry into the upper echelons of government – emphasises the crucial role of state-led industrialisation in much the same terms, though it also takes a more traditionally neoconservative stance in cautioning against a wholesale embrace of the 'industrial civilization' of the West. Wang's thought was deeply influenced by firsthand observation, cautioning that the uncritical adoption of industrial modernity risks promoting the sort of social ills that he himself witnessed as a visiting scholar in the wealthy countries. His experience in the US, documented in his book *America Against America*, offered a cautionary tale, showing how the country's own impressive success in modernisation had been undercut by rapid deindustrialisation and wide-ranging financialisation, which had contributed to the disintegration of the family unit and produced monstrous and degenerative forms of inequality and cultural decay – emphasising stories of black neighbourhoods where you can't stop your car for fear of getting robbed and parks full of homeless people described as 'dirty, filthy, partially dressed, dull-eyed, slow-moving, and with a pathetic look on their faces that you cannot forget after a single glance.'[106]

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104 TJMa 10 February 2019 'Development blogging: understanding social media support for BRI', *Panda Paw Dragon Claw*. https://pandapawdragonclaw.blog/2019/02/10/development-blogging-understanding-social-media-support-for-bri/

105 Quoted in King 2021.

106 Wang 1991, p. 165 (author's translation).

On the other hand, his experience in Singapore convinced him that this path was not inevitable, underscoring the importance of bolstering traditional values. Though certain shortcomings were visible in the city-state, such as 'homosexuality imported from the West, which exists in Singapore in the form of transvestites,' and 'social problems that have arisen after modernization, including the diffusion of social responsibility, a sinking spirit of work, and the decline of ethical concepts,' Wang argued that the strategy of the city-state had been to mobilise 'the essence of Chinese culture to resist Western hedonism and individualism' and thereby 'effectively integrate modernised material culture and traditional Chinese spiritual culture.'[107] Initially, it seems as if this cultural conservatism departs from the program of the Industrial Party, stressing traditionalist themes more familiar to the work of the New Confucians and other classical revivalists and emphasising amorphous cultural concepts as much if not more than familiar developmental measures such as per capita GDP. But it can also be argued that Wang simply takes the Industrial Party paradigm to completion or, more pointedly, that the array of overly-online public intellectuals who compose the Industrial Party are a mere shadow of the much more competent and comprehensive theorists actually capable of wielding state power. The Industrial Party is, after all, largely one-dimensional. In contrast, Wang emphasises the same anxieties and stresses the need for rapid growth led by an attentive state but also cautions that modernisation itself threatens to cause spiritual decay and social anomie, which can only be warded off through the systematic cultivation of traditional values by an enlightened leadership imbued with moral and cultural authority.

Given these broader concerns, it's hardly coincidental that the concept of involution was initially popularised by figures such as Cao Fengze, a civil engineer (at the time pursuing his PhD at Tsinghua University) who drew inspiration from Industrial Party thinkers and reiterates Wang's themes of moral decay in less conservative language.[108] Maybe more importantly, the more hopeful Cao counters Wang's cynical paranoia about the all-encircling degenerative influence of the West with an optimistic idealism rooted in attempts to find a synergy between individualist self-improvement and larger goals of social

107 Wang 2003 (author's translation).

108 More specifically, Cao's work positions itself within an online discourse on questions of hegemony and statecraft that draws both from the more focused developmentalist theory of the Industrial Party and from the more philosophical and academic school of 'Ruguanism' ('entering the pass studies'), which 'analogises contemporary China's relationship to the liberal international order with the Jurchen people's breaching of the Great Wall … and their later takeover of the leadership of China as the Qing dynasty.' (King 2021)

development. For Cao, as for many Industrial Party theorists, one response to the challenges of deindustrialisation and involution in first-tier cities is to move to the frontier where you can assist in the acceleration of technological development in the hinterland or help to build a market for Chinese goods overseas. The Industrial Party offers the macroeconomic justification for such projects, arguing that assistance for infrastructural development in Africa is crucial for China's own future because current demographic trends guarantee that the continent will be a huge market for Chinese industrial products in the coming decades – and one where Chinese firms will both have easier access (compared to the increasingly hostile markets of the high-income countries) and retain an advantage over competitors due to their central role in global supply chains.[109] Meanwhile, Cao offers the microeconomic justification, suggesting that the only way out of self-interest is to actively pursue idealist prospects on either figurative or literal frontiers. He encourages readers to find their 'own Africa,' such as moving 'to a second-, third-, or fourth-tier city' or getting 'a job that pays less but doesn't force you to do overtime.'[110] Nor was this simply abstract advice. After finishing his PhD, Cao himself went to work for the Chinese company contracted to help with the construction of the Julius Nyerere Hydropower Station in Tanzania.[111]

7 The Rebranding of the Sweatshop

Ongoing technical revolutions within production also continually generate an ideological faith that some combination of technical and organizational transformations to production will soon free workers from the drudgery of unskilled manual labour and empower the minority of skilled technicians who remain. Ashok Kumar thereby gestures toward a 'twilight of the sweatshop era' in his study of the organisational fixes deployed by the growing contract manufacturer monopolies against the global brand monopsonies. Since the increasing power of the monopolies concentrates more of the supply chain's total revenue

109 TJMa 2019.

110 Quoted in King 2021.

111 Contrary to hyperbolic media reports, the dam is not a 'Chinese mega-project.' The construction was largely financed with loans from the African Export-Import Bank, the United Bank for Africa and CRDB Bank, alongside funding from the Tanzanian government, and the Chinese company working on it is merely a subcontractor working under two Egyptian firms, Arab Contractors and El Sewedy Electric. (Cao Fengze 21 December 2021 'The reflection of a Chinese idealist in Africa,' Wang Zichen, Wan Zhixin and Zheng Bofei (Trans.), *Pekingology*. https://www.pekingnology.com/p/the-reflection-of-a-chinese-idealist)

at fewer points of production, this gives employees at such firms increased bargaining power, if they are able to seize it. In certain locations in India, this has allowed an emerging crop of unions to win legitimate gains for employees – though, in China, the same wage increases were 'won' more through inflation and top-down regulatory measures, while the worker centres were crushed.[112] Similarly, Xu Hui sees in the technical fixes of rising robotisation in Guangdong the 'potential solution to ease the problems of the sweatshop,' since robotisation creates a new crop of skilled factory positions which, due to the current scarcity of such skills, increase such workers' wages through simple supply and demand. At the same time, the rollout of these new machine technologies also leads to 'more cooperative' labour relations on the shopfloor because 'the disciplinary managerial tactics that are used to control workers on assembly lines are not suitable for these newly-empowered skilled workers.'[113]

But these are narrow perspectives that only focus on a small fraction of the productive workforce. More importantly, they completely fail to connect changing labour relations on the shopfloor to changes in the capital-labour relation writ large. At the organisational level, a limited focus on instances of centralisation often excludes countervailing and inertial trends that have retrenched the position of existing industrial complexes and led to new rounds of fragmentation and even the extension of classic sweatshop labour practices into the so-called service sector. In the light consumer goods industries, for instance, the rise of new ecommerce monopolies has just as often redoubled competition among the smaller suppliers that remain by reproducing and even intensifying classic buyer-driven inequities at the domestic level, all while incentivizing tertiary sector industries such as livestreaming to adopt increasingly sweatshop-like conditions. For example, the emergence of Hangzhou-based ecommerce giant Alibaba, which owns the online shopping platform Taobao – China's domestic Amazon equivalent – was accompanied by the rise

112 To take one of many examples, a picker at a Shein supplier warehouse in Guangzhou was reportedly making 10,000 RMB a month in 2020, compared to the 6,000 RMB the same worker had made when employed in the electronics sector in Shenzhen only a few years prior. This is despite Shein suppliers still being prototypical 'sweatshop' firms where production is spread across hundreds of grey market workshops in Guangdong and Guangxi, often knit together by family networks. Similarly, this supplier cluster had seen little to no strike activity in recent years, despite suffering exactly the same sort of devastating industrial fires and intensive exploitation documented by Kumar in South Asia (Wu Peiyue 17 September 2021 'The Shady Labour Practices Underpinning Shein's Global Fashion Empire', *Sixth Tone*. https://www.sixthtone.com/news/1008472).

113 Xu 2020.

of so-called 'Taobao villages,' where all the logistical functions of online sales were concentrated in physical space, allowing for greater degrees of spatial and organizational separation from the actual manufacturers.

These early Taobao villages were filled with small merchandisers, warehouses, and affiliated service providers in digital design, photography, and livestreaming, all of whom were in intense competition with one another and, as costs rose, also came into conflict with new competitor villages doing much the same work but benefiting from cheaper local costs of land and labour. As goods were designed and sold by these service-oriented firms, their logistical networks could then quickly transmitted the orders to backend manufacturers. In some cases, these were initially 'artisanal' handicrafts produced in local households and workshops. Beyond a certain scale, however, orders were going out to factories that were often located in other towns or provinces. In many cases, direct shipments could be even arranged from the factories to the customers, cutting down on packing and packaging costs. In other cases, local warehouses would stock short runs of items that could be packaged rapidly onsite. Though the basic model has now been reproduced nationwide, coastal Zhejiang has remained at the centre of the trend, hosting the headquarters of major ecommerce firms in Hangzhou and serving as home to some of the earliest Taobao Villages clustered around the city of Yiwu, still the world's largest single centre of wholesale trade in consumer goods.[114]

The basic business model of dropshipping adopted by these Taobao villages then led to substantial growth for the most successful retail platforms, which subsequently helped to reshape the structure of domestic supply chains.[115] To return to the example of Shein: the company began in 2008 as little more than a website with small offices in Nanjing (located in the same Yangzi River Delta megalopolis as Hangzhou and Shanghai) which specialised in the dropshipping of wedding dresses. Within a few years, it had expanded to retailing a broader range of women's apparel and then began expanding into the fast fashion market more aggressively. In 2015, the company relocated its headquarters to Panyu

114 Qian Linliang 4 October 2022 'Shifting Fortunes in a "Taobao Village"', *Sixth* Tone. https://www.sixthtone.com/news/1011332/shifting-fortunes-in-a-taobao-village; Wu Peiyue 10 February 2022 'In Taobao Villages, Merchants Say They're Struggling with Livestreaming', *Sixth Tone*. https://www.sixthtone.com/news/1009636/in-taobao-villages%2C-merchants-say-theyre-struggling-with-livestreaming

115 Dropshipping is when a retailer takes orders without having products in stock, immediately transferring the order to whichever supplier is able to fulfil it most quickly. This means that dropshippers require no brick-and-mortar storefronts or warehouses. Though the practice was initially affiliated with online shopping scams, it has since evolved into a fully-fledged system of supply chain management.

District in southern Guangzhou, where it could be closer to the garment manufacturers and wholesalers it relied on, many of whom were small grey-market workshops and warehouses located in the still-industrial urban villages at the city's suburban fringe. The firm hired in-house designers (targeting cheaper vocational school graduates), doubled down on its advertising (especially on popular Western Gen Z platforms like TikTok), aggressively expanded its supply chain network (concentrated in Guangzhou, parts of rural Guangdong, and neighbouring Guangxi), intensified its dependence on labour dispatch firms (which supply temp workers on short notice), and implemented a ruthless system of evaluations for suppliers (pouring the bulk of its revenue in the late 2010s into building up a flexible logistics infrastructure). By 2021, the company had overtaken H&M and Zara as the top-selling fast fashion retailer in the US market. By early 2022, it had become the fourth most-valuable tech startup in the world, with an estimated valuation of 100 billion USD. Later that same year, the company finally opened its first permanent brick-and-mortar location in Tokyo. Up until then, the retailer had owned no stores.[116] These practices were soon emulated by other firms such as Pinduoduo (which operates overseas as Temu), a more general-purpose ecommerce platform that serves as a lower-budget Taobao.

The basic pattern can also be found in more advanced product lines. Consumer electronics brand Xiaomi, the second largest manufacturer of smartphones in the world, also began as basically a glorified dropshipper. Though it has subsequently opened brick-and-mortar shops, the company still sells the majority of its phones online. Meanwhile, prior to February of 2020, Xiaomi's smartphones were produced entirely by domestic ODM suppliers. Even after opening its own factory in Beijing, the firm still relies on ODM subcontractors for the vast majority of its smartphone supply. Unlike the case of Shein, however, Xiaomi's buyer-driven chains have not helped to retrench fragmented workshops in the old urban village complexes but have instead encouraged further concentration in leading domestic contract manufacturers headquartered in the coastal cities. Its three largest smartphone suppliers – Wingtech, Longcheer, and Huaqin – have all served as suppliers for major global brands. The company has also grown through international expansion, collaborating with Taiwanese contract manufacturers such as Foxconn to open plants in India and Vietnam.[117] In other words, the emergence of Chinese lead firms helming

116 Wu 2021; Ma Rui 16 June 2022 'What Chinese media reveals about Shein's secretive operations', *rest of world*. https://restofworld.org/2022/shein-supply-chain-success/

117 Xu 2025.

buyer-driven supply chains via their control of ecommerce platforms has simultaneously contributed to the retrenchment and reinvention of the informal 'sweatshop' sector and the emergence of larger manufacturing monopolies where employment is supposedly more formal. But even the most centralised of these formal employers have also begun to rely on an array of informal labour dispatch services (including the use of interns from local technical schools) in a pattern that mimics the employment structures of the 'gig economy' within manufacturing.[118] At all levels, this has resulted in the extension of precarity to an expanding segment of the workforce and the intensification of gender disparities, even while certain skilled occupations have seen wages and stability increase.

Thus, the focus on a narrow subset of industrial workers directly employed by central monopolies can distract from changes in the more general composition of the working class across the entire supply chain or larger industrial territory. For example, Xu is completely correct in noting that robotisation increases the skill-level of the average industrial worker, thereby leading to higher median wages and, as Kumar argues, increased 'structural power' in the labour market. But this fact is deceptive, because the very increase in 'the average' here is achieved through the shedding of lower-end segments of the labour process, which entails laying off the unskilled workers holding those low-paying jobs. It's the same thing as increasing the average income of a neighbourhood by pricing out its poorest residents, thereby transforming 'the neighbourhood' into a qualitatively different entity than it was in the past. In the same way that these poor residents don't disappear or become any richer, those unskilled workers shed by the mechanisation of a product line don't die off, nor are they magically transformed into the new crop of skilled workers fixing machines. In fact, since the entire point of robotisation is to produce more output per unit of labour, the process guarantees that a smaller number of skilled workers replaces a larger number of unskilled workers. Thus, even if every worker could somehow be retrained, fewer would be necessary. Meanwhile, those unskilled workers still require jobs to live. Some may find work in less mechanised factories in the interior or in the holdout workshops in the coastal metropoles. But, at the macro scale, it's clear that more of the crop of unskilled workers that once held jobs in manufacturing (or younger cohorts who would have once gone to work in the factories) are now forced to find work in the even more precarious service sector.

118 Dong 2022.

It is no surprise, then, that the class struggle once centred on the factory complexes of the export deltas had, by the end of the 2010s, begun to flood into the tertiary economy. These trends only intensified with the outbreak of the pandemic and the increasingly stringent lockdowns that followed, which saw consumption plummet even as the workload placed on low-wage delivery drivers, nurses, logistics workers, sanitation staff, and those manufacturing goods for export continued to increase – with the latter now literally locked into 'closed-loop' dormitory systems at facilities like the Zhengzhou Foxconn plant.[119] Meanwhile, youth unemployment (among those aged 16–24) rose nearly 20 per cent by 2022, and the first of the post-'00 generation to go to college faced continual interruptions and limited job prospects.[120] Despite popular perceptions that these problems were generated by the government's Zero-COVID program, the pandemic merely accelerated trends already visible in the years prior and which have persisted in the years after the country's sudden reopening. For example, residential lockdowns and closed-loop production relied on an expansion of the last-mile logistical supply systems established by the ecommerce industry, which fundamentally rely on informal gig labour governed by rapid-fire delivery and sortation algorithms that often put the health and lives of couriers and warehouse workers at risk. By the end of the 2010s, such sectors had already grown to a staggering scale. The pandemic merely made use of this new capacity. In 2020 alone, 'delivery workers fulfilled some 60 billion orders across China,' all while delivery times were tightened and the per-unit commissions earned by drivers had been cut by some 25 percent, on average, in that same year.[121]

Similarly, this labour regime had already led to a snowballing series of struggles in the latter 2010s. Often, these labour conflicts overlapped with resistance against urban rationalisation campaigns that sought to level poor neighbourhoods, deport the 'low-end population,' and clear the streets of informal hawkers and couriers. In 2016, Shenzhen initiated a widespread crackdown on unlicensed motorised vehicles, impounding nearly 18,000 of the electronic bicycles and tricycles commonly used by delivery drivers, and detaining nearly 900 of the drivers themselves. The campaign led to a series of minor clashes with

119 Friedman 2022b.

120 Ye Zhanhang 16 August 2022 'China's Youth Unemployment Rate Sets a Record, Again', *Sixth Tone*. https://www.sixthtone.com/news/1010992/chinas-youth-unemployment-rate-sets-a-record%2C-again

121 Feng, Emily 13 April 2021 'He Tried to Organise Workers in China's Gig Economy. Now He Faces 5 Years in Jail', *NPR*. https://www.npr.org/2021/04/13/984994360/he-tried-to-organise-workers-in-chinas-gig-economy-now-he-faces-5-years-in-jail

police, followed by a mass resignation of couriers.[122] Soon, strike activity had also begun to increase. The total number of strikes in the food delivery sector quadrupled between 2017 and 2019.[123] Though actions slowed with the initial lockdowns in 2020, they immediately revived as soon as the first pandemic measures were lifted, accompanied by a series of high-profile media exposés documenting the plight of such work.

By the end of 2020, 'strikes and protests by *kuaidi* couriers, many of whom deliver orders from China's flourishing e-commerce industry [had] increased, with Service Worker Notes reporting thousands of posts online regarding courier strikes just this year.'[124] Activity peaked around 'Single's Day' on 11 November (China's major shopping holiday) when express couriers led a series of protests and slowdowns, accompanied by mass resignations. To put these strike actions into context, when ecommerce giants like Alibaba and JD.com began rolling out home delivery services in the mid-2010s, 'the average wage for couriers hovered around 10,000 yuan ($1,500) per month, more than twice the average salary at the time.' By 2021, however, salaries had 'dropped to about $800' on average, while the rate of workplace injury and death had skyrocketed.[125] Soon, nearly every veteran courier knew of someone injured or even killed on the job, and most had suffered at least minor injuries themselves. As in other sectors, this was the result of a ruthless price war between ecommerce firms, leading not only to declining wages for workers but also narrowing profits for the companies, with major firms like Yunda Express reporting that, while it's 'volume of deliveries increased by more than 1 billion' between mid-2019 and mid-2020, the 'profit per parcel dropped from 0.30 yuan to 0.12 yuan.'[126]

Informal, union-like organisations soon arose within the sector, organised via popular WeChat groups. The largest of these was the 'Delivery Riders Alliance,' founded in 2019 by migrant courier Chen Guojiang (known by his title Mengzhu, or 'Alliance Leader'). Chen livestreamed the day-to-day lives of delivery drivers, administered in-person events such as a monthly dinner with fellow workers, and oversaw the Alliance's various WeChat channels, which offered

122 Lin Hai [林海], 6 April 2016 'How bad can it get for couriers?' [快递员可以有多惨？], Industrial Zone Observer [工业区观察]. Translated in: Chuang 5 May 2016 'Bicycle couriers in China's own "logistics revolution"'. https://chuangcn.org/2016/05/couriers/

123 Chuang and Friends, 12 November 2020 'Delivery Workers, Trapped in the System', *Chuang Blog*. https://chuangcn.org/2020/11/delivery-renwu-translation/

124 Ibid.

125 Feng 2021.

126 Zhao Yiwei 7 November 2020 'Amid Price War and Unpaid Wages, Couriers Strike and Strive', *Sixth Tone*. https://www.sixthtone.com/news/1006403/Amid%20Price%20War%20and%20Unpaid%20Wages,%20Couriers%20Strike%20and%20Strive

free legal consultations and other forms of assistance to drivers ranging from vehicle repairs to conflict mediation to arranging housing for new migrants. He also organised several small strikes, many of which were successful in winning their demands. Though detained by police soon after founding the group, Chen continued the work after his release and the alliance grew rapidly over the next two years, with its channels reaching some 15,000 workers.

The Alliance did not, however, resemble a traditional labour union, and its organising strategies departed substantially from those forecast by the activists and scholars who had continued to predict the coming of a 'labour movement' in China. The Alliance was instead a strange hybrid of chatroom, solidarity network, legal services NGO, and entrepreneurial scam:

> Those who knew him also described how Mengzhu had turned his platform into a kind of small business for himself as well, earning small fees here and there, including by collecting bonuses for recommending riders to the platform, or from the events that he hosted for riders. … In his discussions with friends, he noted emphatically that his style of organizing could not be emulated and attributed its widespread appeal to his personal obsession with networking, helping others and streaming to his audience … In this case, social media fame and even a sort of small-business entrepreneurial ethos seem to have been integral to the growth of Mengzhu's network.[127]

As Geng Jun's holy fool reminds us: we are all sinners, in the end. In 2021, Chen was detained again, and formally charged with the catch-all crime of 'picking quarrels and provoking trouble' used to imprison activists and organisers throughout the preceding decade. Though apparently released in 2022, Chen has remained mostly silent on social media since. Meanwhile, the Alliance's channels were largely shut down, and no new organisation has arisen at anything like the same scale.

8 Be Angry, Be Mad, and Live Your Life Well

Strikes among service workers have so far been short-lived, meeting much the same fate as the campaign against 996 among tech workers. Alongside the new legal limits placed on the livestreaming industry, regulators also mandated

127 Chuang 2021a.

basic labour standards for gig workers and put in place broader legal frameworks to prevent speculation and overleveraging in the fintech sector, which had become a crucial source of credit over the course of the 2010s. But, similar to the new regulations for tech workers, it remains doubtful that such laws will do much more than place further pressure on wages. Meanwhile, the prospects for proletarian struggle in general and within the gig economy in particular appear grim. Echoing the Foxconn suicides at the beginning of the decade, the first few years of the 2020s saw a spate of high-profile suicides that were widely reported on in social media. The most shocking of these was the suicide bombing of a government office in Guangzhou's Panyu district in 2021, the site where Shein had piloted its hyper-flexible dropshipping logistics system:

> On the morning of March 22nd, when local officials were said to be having an important meeting, a man surnamed Hu walked into the Mingjing Village Committee Building, his body strapped with explosives improvised from construction materials. The blast rang out at around 10am and killed five people in the building, including Mr. Hu, injuring five more. An edited video circulated by state media in the aftermath showed broken furniture and other debris scattered throughout a concrete building with blown-out windows. But the full version of the same video that circulated like wildfire online contained footage of the blood-stained walls of a state hall of power.[128]

Though official accounts never explained the reasons for the attack, a number of nearby residents responded to the early videos posted on social media theorising that Hu was involved in a well-known land dispute with the committee of the urban village, which had sold off the collectively owned land to a developer from Shanghai and pocketed the money.

Other cases were even more clearly linked to the issues of financialisation, deindustrialisation, and involution that have become such wide concerns in recent years. Some could even have been lifted straight from one of Geng Jun's rustbelt tragedies:

> Just two days after Mr. Hu took his life in Panyu, a 33-year-old worker named Wang Long jumped into a blazing steel furnace in Baotou, Inner Mongolia, allegedly after losing 60,000 yuan on the stock market. … The

128 Chuang, 23 May 2021b 'Bombing the Headquarters: Desperate Measures in a Time of Involution', *Chuang Blog*. https://chuangcn.org/2021/05/bombing-headquarters/

> incident at Baotou Steel, a large state-owned enterprise, caused some to connect his death to the plight [of] the hundreds of thousands of state-owned enterprise workers laid off in the late 1990s and early 2000s.[129]

And such suicidal struggles were even more common among hard-pressed gig workers and truck drivers. In Taizhou, Jiangsu earlier in the same year,

> a food delivery rider for Ele.me attempted suicide by self-immolation … after being denied 5,000 yuan owed to him by the company – equivalent to one month's pay … At the hospital, Liu told his sister 'I don't want to live. I've lived enough, I'm exhausted.'[130]

Later reports showed that Liu's family had also been suffering under expensive medical bills, an increasingly common issue in the rapidly privatised but haphazardly regulated healthcare sector.

Similarly, in April of 2021, a 51-year-old truck driver named Jin Deqing, struggling with debt and supporting an unemployed wife, two children, and elderly parents on a single salary, was stopped at a weigh station in Tangshan, Hebei, for not having a working GPS. Jin was fined 2,000 yuan (roughly one-third of his total savings at the time) and had his vehicle confiscated by police. In response, 'He went to a nearby shop, bought a bottle of pesticide … drank it at the weigh station and was dead before the day.' As he waited to die, Jin sent a message to a WeChat group frequented by fellow truckers, where he explained his plight and apologised to his elderly mother:

> I feel that I'm not going to live much longer, so I use my death as a warning to those in the leadership … I was going to die sooner or later anyway, so now I'm just dying a little earlier … My name is Jin Deqiang. My truck number is 1308. Goodbye forever to my son and daughter. After I die, take good care of your grandma and mother. Son, take care of your sister. Don't be too sad after I'm gone. Be angry, be mad and live your life well. Don't be a good for nothing like me.[131]

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129 Ibid.

130 Ibid.

131 Ibid. Note that, in the original Chinese, the last two characters of the phrase 'be angry, be mad' (生气赌气) are impossible to translate concisely here. They don't simply indicate being 'mad' so much as being hopelessly angry over a perceived injustice, holding a grudge, or acting rashly out of spite.

The note was shared widely among truckers, resonating too well with some. Just a few days later, 'a young truck driver from Shandong, surnamed Zhao, slashed his wrists at a weigh station in Qingyuan, Guangdong province, after his truck was detected to be overweight' by a mere 240 kilograms, resulting in a hefty fine and causing him to have points deducted from his license.[132]

Nor have such cases been limited to China. The rise in 'deaths of despair' within the US has been well documented and is often compared to a similar spike in such deaths in the 1990s across the countries of the former Soviet Union. Similarly, a number of high-profile suicides accompanied large-scale protests in Brazil in the final years of the Bolsonaro administration. As in China, these suicides were centred on self-employed and gig-style occupations like trucking or last-mile delivery and taxi services:

> In the leadup to a national truck drivers strike on February 1st, 2021, a video circulated through WhatsApp groups of a driver who had hung himself in a tree by the side of the highway, next to his truck. The scene was shared with mournful messages and warnings about the desperate situation of self-employed truckers, who were trapped between low freight rates and spikes in driving costs, especially fuel.[133]

This 2021 strike was itself only a small-scale repetition of a much larger shutdown in May of 2018, 'during which the supply chains of the whole country were choked in a matter of days.' But the unrest, combined with the rise in fuel costs, soon spread to other workers in similar sectors, with demonstrations

> by couriers, app drivers, and self-employed school bus drivers [taking] place almost daily … This movement of motorised workers blocked highways and Petrobrás distribution centres; it crammed itself into gas stations, with the tactic of refueling only 1 real to produce queues and cause losses to the retailers; it reignited the organization of the courier strikes, and powered the largest motorcade of Uber drivers in the history of São Paulo, which blocked access to the Guarulhos International Airport for an entire night, demanding the end of low paid promotional rides.[134]

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132 Ibid.

133 Militants in the Fog 28 October 2022 'Work and Revolt at Brazil's Dead End', *Ill Will*. https://www.illwill.com/work-and-revolt-at-brazils-dead-end-ii

134 Ibid.

Describing conditions of involution in everything but name, the Brazilian gig workers complained of 'the endless rat race, *viraçāo* [getting by] under more and more adverse conditions.'[135]

Other cases in Brazil further echoed those in China: 'a man from São Caetano do Sul confined to a wheelchair strapped fake explosives to his body and threatened to blow up a Social Security Institute building if he wasn't granted access to his disability pension.'[136] Another man 'crashed his car into the reception desk of an overcrowded public hospital … after his wife, infected with Covid, was denied care.'[137] Such events express less an easily comprehensible political subjectivity than an amorphous and weaponised hopelessness. Under such conditions, 'the lethargy of the left contrasts with the insurgency of the far-right, which feeds on the mobilisation of those who no longer harbor any hopes.'[138] In the Brazilian case, the popular left parties mobilising in support of Lula against Bolsonaro (modelled in part on the Biden campaign in the US) did little more than suggest that gig work and the trucking sector might be regulated under a new labour law. Meanwhile, the app companies themselves began recruiting 'cadres forged in NGOs and social projects in favelas' to 'engage in *dialogue*' in the form of a 'Delivery Workers Forum' meant to placate the workers without offering any real solutions.[139] There is thus a broad homology visible across countries, which see similar strategies used to mute the moral force of suicidal struggles in fear that their spiteful spirit will be used to build out the base of the far-right. But the precise politics of such actions are often impossible to parse. For example, on Christmas of 2020, a man named Anthony Quinn Warner bombed an entire city block in the middle of the US city of Nashville in a suicide attack 'that brought down critical infrastructure, designed to kill no one but its detonator, and whose ideological justifications remain frustratingly opaque.'[140] Perhaps more shocking was the speed at which the event seems to have simply been forgotten. Something about the '*fundamental* indeterminacy of his actions' first triggered 'frantic efforts to cobble together a digestible motive' and, failing this, seemed to cause the event to simply dissipate from the public consciousness.[141]

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135 Ibid.
136 Ibid.
137 Ibid.
138 Ibid.
139 Ibid.
140 Wang Nanxian and Torino, Paul 24 December 2021 'Downtown Fucked: Reflections on the Nashville Explosion', *Ill Will*. https://illwill.com/downtown-fucked
141 Ibid.

In other words, in every country of the world, we do not find a coherent working-class politics awaiting external intervention or internal expression to be rendered into a coherent socialist program but instead a nebulous, post-industrial rabble wielding rage and hopelessness in explosive, suicidal, and amorphous struggles that seem committed to little more than drawing blood wherever it might be drawn. Invariably, this rabble finds itself caught between the 'diverse and equitable' social movement technocracy of the Lulas and Bidens and the spiteful spectacles stoked by the lumpenbourgeois populism of the Bolsonaros and Trumps. In China, these conditions of general anomie only intensified over the course of the pandemic, reaching their peak in 2022, when harsh lockdowns proved both unable to contain the outbreak of more subtle variants of COVID-19 and triggered what would become the largest series of mass protests in the country since the strike wave of the previous decade, with the broadest participation (in terms of both geographic spread and the backgrounds of its participants) since the urban uprisings of 1989. Soon, however, its coherence disintegrated under the centripetal pull of widely divergent demands deriving from vastly different demographics. Close observers stressed that, rather than a single uprising, the revolt was better understood as several divergent currents expressing disconnected interests that emanated from their distinctly different positions across the class. One common leftist formulation emphasised 'three movements' that coexisted in tension with one another: a workers' movement, a student and urban professional movement, and a movement of the Chinese diaspora overseas.[142]

Per standard practice, however, the events were deemed a 'democracy' movement by foreign journalists, who almost exclusively focused their attention on the relatively small, non-violent gatherings of students and wealthy urbanites who held up blank sheets of paper protesting censorship, demanding an end to the lockdown, and even calling for those in power to step down. The same narrative was reinforced by both leftist protestors within the Chinese diaspora and many of the students and young professionals participating in white paper protests within China, who carefully draped their own demands over the swell of popular unrest, giving it the appearance of an 'anti-lockdown' and

142 For two of the most widely shared examples of this position, see: Zuoyue [左玥] 2 January 2023 'Why Were the White Paper Protests Comprised of Three Movements? Understanding the Revolutionary Features and Limitations of the Anti-Lockdown Protest Wave' [为什么白纸抗议是'三个运动'？理解封控抗议潮的革命性和局限性], *Matters*. English Translation: https://chuangcn.org/2023/01/three-autumn-revolts/; and Wu Yun 7 December 2022 [乌云], 'November: A "Revolutionary" Rehearsal' [11月，'革命'的语言], *Liberation News* [解放报]. https://telegra.ph/11%E6%9C%88%E9%9D%A9%E5%91%BD%E7%9A%84%E9%A2%84%E6%BC%94-12-07

'pro-democracy' movement. The demands of these upper strata were invariably portrayed as the properly political demands of the movement, whereas those of its proletarian majority were understood to be focused on mere questions of subsistence. But the political 'values' of these better-off protestors seemed to accord suspiciously well with their own material interests. Meanwhile, the largest of the protests had nothing to do with democracy. By far the most common and most significant were a series of riotous conflicts centred in (but not limited to) urban villages and focused on reproductive demands over the same basic terms of subsistence – already at issue in the suicidal struggles over the preceding years, and now made more extreme under the closed loop of the lockdowns. In these conflicts, proletarians forced their way out of lockdowns, fought the police sent in to quell them, and expressed their rage at having no jobs, no means through which to acquire basic goods, and no way to leave the area.[143]

There is no easy political lesson here, other than the simple reminder that we cannot turn our eyes away from such struggles when we find them lacking. The politically-incorrect incoherence of such events, their suicidal strategies of pyrrhic spectacle, and even the sad self-slaughter of hopeless workers unmoored from any collective fury who choose instead to rage as they have suffered, alone – these are not departures from proletarian politics but instead direct expressions of how we experience class and conflict, mirroring our era's deepest truths:

> Loneliness, alienation and estrangement from ourselves and others is at once the most general experience in our time (perhaps even the *last* general experience possible) as well as its most public secret.[144]

We are again left with the lonely wandering of thieves across the frozen fields of Heilongjiang. In the end, both the technocratic and romantic reveries carry the same ambiguity as the bar of poisoned soap in *Free + Easy*. Slowly, we realise that these utopias are little more than tastes of suicide. There is no satisfying moment of justice or salvation. One of the inept police officers in the film later tries to use a confiscated bar of the sleep-inducing soap to sexually assault a local woman, only to keel over and die in the process. Though it has an

143 Zuoye 2023. While the largest and most aggressive of these took place in urban villages, similar clashes occurred at a smaller scale in residential complexes throughout the country, where they took on a character similar to the homeowners' protests that had been bubbling up in the years prior.

144 Wang and Torino 2021.

undercurrent of sardonic vengeance, the scene is anticlimactic by design, with the drunken cop simply gurgling quietly and closing his eyes until his body lies just as lifeless as that of the unconscious woman next to him. His death then becomes yet another burden on the main characters, who have to figure out how to get rid of the body without the town's other corrupt cop finding out. In the final sequence, his corpse is burned under a pile of dried stalks in a fallow field like nothing more than the residue of an untended crop. The camera then cuts to an eerie, greenlit image of the dead man walking through the snow, his eyes closed. The scene is dreamlike, seeming to show his descent into the underworld. But then the other characters follow, all in the same hypnotic pose. Geng himself describes the shot as one of 'dead men walking in hell.'[145] We were here all along. We still are. In the final image, the dead cop raises his gun and fires twice into the camera, which cuts to black. According to Geng's grim moral logic, all of us are guilty and no one escapes.

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145 Quoted in Wildman, John 30 January 2017 'Ten Burning Questions: Jun Geng's FREE AND EASY', *Films Gone Wild*. https://filmsgonewild.com/ten-burning-questions-jun-gengs-free-and-easy/

PART 2

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CHAPTER 6

Hell Money

It is 2014 and I am watching a fire kindle in an alley in Hong Kong. It is the tenth day of the eighth month of the solar calendar, the very middle of the season when the typhoons dance like drunken gods.[1] And it is the fourteenth day of the seventh lunar month, when the doors to hell burst open under the pressure of the dead.[2] Spirits spill up like ice water from their underworld aquifers, pouring over streets wet with warm rain. The shadows writhe with the silent motion of these congregating ghosts. Food is left for them in archways and shrines, fruit glistening with dew. Slowly, the city fills with their cold convocation. Rain glitters on cement like the lights of a miniature carnival spilled out on the sidewalk. Smoke rises in strange shapes from piles of joss paper. In the same alleyway, a man squats down and uses his cigarette to kindle another ceremonial fire under a bundle of hell money modelled after US federal reserve notes, one side emblazoned with the face of the Jade Emperor, the supreme figure of heavenly authority, and the other with Yanluo, judge of the dead and fifth and foremost of the ten kings of the underworld. Once burned, the money and other joss paper offerings are transferred to the wandering dead. This commerce in fictitious goods passing in fire through the alleyways therefore poses itself as an ironic counterpart to the flows of fictitious capital coursing through the skyscrapers above – the city one of the world's most important financial centres – rendered in ghostly digital ledgers that count out, allocate, and proliferate that great global pool of value bled out of the factory cities and accumulated here, where the hungry ghosts walk in the shadow of the stock exchange.

The differences between the many portrayals of the afterlife within the Chinese cultural imaginary and the one immortalised in the Western canon by Dante are too numerous to be listed here and too fundamental to offer any easy cosmological comparison. But maybe the most distinctive is the fact that, in the Chinese case, the underworld is governed much like our own. Though separate,

1 Strangely, this was the day on which another fire was lit in a small suburb on the other side of the world, in Ferguson, Missouri, where I would find myself weeks later.

2 Within the Chinese ritual calendar, the seventh lunar month is the Ghost Festival, during which ghosts and spirits come out from the underworld (and other *yin* regions in Chinese cosmology) to wander the earth. Though many regions give offerings to the dead throughout the entire month, either the fifteenth or the fourteenth day of the month (in Southern China, usually the fourteenth) is considered to be the period when the separation between the worlds is thinnest. In Hong Kong, this day is the focus of the festival.

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the barrier between the two spheres is also permeable, with the most common stories of katabasis being, on the one hand, cases in which bureaucratic errors see the wrong individual brought before Yanluo and the other kings of hell to be judged – usually the error is corrected and they are released, often after being given a tour – and, on the other, those in which various forms of guile and corruption are mobilised to win an extension of life for the person in question.[3] In maybe the most famous case of the latter genre, as immortalised in the Ming dynasty novel *Journey to the West*, Emperor Taizong of the Tang Dynasty escapes death through classic bureaucratic means: plagued by ghosts sent to haunt him by a dragon king he'd had executed, the emperor falls sick. The condition rapidly worsens and, while on his deathbed, minister Wei Zheng gives the emperor a letter to take with him to the underworld. The letter is addressed to Wei's close friend Cui Jue, who had died and subsequently been appointed as one of the judges of the underworld, where he oversees the book of the dead. The letter asks that Cui do his friend Wei a favour and modify the ledger, granting the emperor an extended life. After he dies, Taizong meets the judge Cui and hands over the letter. In response, Cui immediately agrees to return him to the world of the living. First, however, the emperor must go into the underworld to face a lawsuit levelled against him by the dragon king, adjudicated by the ten kings of hell. After defeating the lawsuit – which the kings explain was little more than a formality, since the dragon's execution was fated, and he had already been sent ahead to his next reincarnation – Cui checks Taizong's entry in the book of the dead and secretly adds twenty years to his life. The kings then formalise his release, sending him under escort through several circles of hell to reach the wheel of Samsara, from whence he is allowed to pass back into his body.[4]

In the images of hell recounted in such tales of katabasis, we find a picture of the bureaucracy itself as something like the differentiated social fabric that unites the distinct spheres of earth, underworld and heavens, complete with collusion, corruption, and clerical errors at every level.[5] Similarly, the ritual of

3 Among the earliest instances of the bureaucratic error genre is the account of the monk Daoming recorded in the Dunhuang manuscript 'Record of the Returned Soul' (還鬼記).

4 For an overview of medieval depictions of hell in China and a description of several tales of katabasis preceding that recorded in *Journey to the West*, see: Teiser 1988.

5 In Buddhist terms, these are all realms within Samsara, governed by the karmic commerce of rebirth. But the basic idea of a continuous moral cosmology spanning the underworld, our own existence, and the heavens preceded the introduction of Buddhism to East Asia. Similarly, the idea of a bureaucracy governing both heaven and hell was already common prior to the introduction of the Buddhist naraka system, as were the forms of ritual offerings that would later take on a karmic weight.

burning joss paper signals a certain continuity of economic power as well, with spirits in need of offerings of money and possessions to ensure their successful reincarnation. In his tour through hell, Taizong is led to the City of the Dead, where he is confronted by a wailing rabble:

> Then he saw a throng of spirits, some with backs broken by the rack, some with severed limbs, and some headless, who barred his way and shouted together, 'Give us back our lives! Give us back our lives!'[6]

As Taizong recoils in terror, Judge Cui explains that these are spirits who have no living patrons left to provide offerings: 'Since they have no money or belongings, they are ghosts abandoned to hunger and cold.'[7] In other words, these are the very ghosts – the proletarian class of the damned – who emerge from the underworld during the seventh lunar month to receive offerings made to the anonymous, wandering dead. In response to this information, Taizong has Cui arrange for a loan to be made in his name (hell, of course, has something like an Exim Bank specialised in cross-world credit) and promises to also hold a special ritual for the spirits upon his return to the worldly throne. Despite being confined in the underworld, then, such spirits are nonetheless reliant on both the economic and political power of the living, as filtered through the bureaucracy of hell itself. They throng around Taizong not because he is a living human in the land of the dead, but because he is an extremely powerful man with access to immense wealth and the ability to mobilise the ritual apparatus of the state. They therefore petition him much as they would have been allowed to formally petition the imperial bureaucracy for redress of their grievances in life.

In many other ways, however, the Chinese underworld mirrors its Occidental counterpart, and Taizong's journey that of Dante. This is especially true after the introduction of Buddhism, which systematised earlier folk beliefs about the afterlife and synthesised them with the cycling of samsara.[8] One broad similarity is the way that specific punishments for the dead come to match the forms of immorality that they practiced in life. In the Buddhist underworld recounted by Taizong, hells are sorted by the nature of their sins, each churning spirits through a measured karmic retribution: the hell of tongue-ripping for those who spread ill rumours in life; the hell of ice, where adulterers, schemers, and

6 Yu, 2012, p. 261.

7 Yu 2012, pp. 261–2.

8 For an impression of how Chinese folk traditions conceived of the underworld, see: Yü, Ying-Shih, '"O Soul, Come Back!" A Study in the Changing Conceptions of the Soul and Afterlife in Pre-Buddhist China', *Harvard Journal of Asiatic Studies*, 47(2), December 1987. pp. 363–395.

those who deceive elders are left alone on a barren, frozen mountain; the hell of the wrongful dead, where those who took their own lives wander without escape, pelted by the wind and the rain; the hell of the mountain of knives, climbed by those who murdered for pleasure. But, in contrast to Dante's somewhat anarchic hell where each sin organically produces its own punishment tended here and there by demonic assistance, the various hells of the Chinese underworld are regimented and carefully governed by an entire infernal bureaucracy specialised in the doling out of tortures. Punishment is weighed, reincarnation administered. Lawsuits are heard, loans are arranged, and those with the right connections can always ensure that a finger is placed on the scales. While Dante is guided by a noble poet of antiquity, Taizong is led by a tactful bureaucrat.

Maybe even more telling is that fact that, in Dante's hell, Satan sits trapped and mute in a field of ice, less a king than a prisoner. Not so for Yanluo and the other kings of hell, who hold court alongside faithful ministers, judges, and an entire entourage of servants. Moreover, unlike the eternal punishments of the Inferno – which is strictly separated from the spheres of Purgatory and Paradise – the Chinese underworld is but one domain in an intricately interconnected cosmological continuum spanned by karmic commerce, which also means that its governance has a direct, juridical relationship to that of the worldly state. Hell is, in other words, merely a province of power. When Taizong is brought before the ten kings of hell, for example, they bow before him and suggest that he be the one to lead their procession into the Hall of Darkness, rather than the other way around: 'Your Majesty is the emperor of men in the World of Light, whereas we are but the kings of spirits in the World of Darkness. Such are indeed our appointed stations, so why should you defer to us.'[9] Similarly, worldly authorities prostrate themselves before the heavenly and the heavenly before the various Buddhas, which take on the character of a supra-authority in their synthesis with the pre-existing folk cosmology of the region. The hierarchy is clear enough in the earlier chapters of the *Journey to the West* when the Monkey King Sun Wukong challenges the kings of hell, wipes his name from the ledger of reincarnation, and then defeats all the armies of heaven only to be trapped in the very palm of the Buddha, who imprisons and then attempts to domesticate the rebellious ape.

In Hong Kong, then, the burning of hell money in the alleyways below and the coursing of capital through the towers of glass and steel above also exist on the same continuum. After all, on the fourteenth day of the seventh lunar

9 Yu 2012, p. 255.

month the hungry ghosts do not so much escape hell as transit from one domain in the great continuity of power to another. They flood out of the underworld and into the hellworld of capital, since it is only here that they can obtain the money that they, just like you or I, require to live – or, in their case, to live again. Even in death, then, we escape neither state authority nor economic compulsion. Alone, this would be a bleak and bitter truth. But the inverse also holds. Even in hell, rebellion is possible. More than this: precisely because power is a continuum running from hell's furthest hinterlands to the palaces and peach orchards of the metropolitan heaven, an insurrection begun in the belly of the underworld – in the very place where the factory-wheel of Samsara turns like a grindstone, its managers measuring karmic debts and meting out allotted punishments – would soon spread to unsettle the foundations of the entire cosmological order. If properly tended, sparks kindled in the underworlds and alleyways can grow into an inferno of a different kind, climbing the ladder of power until even the steel and glass palaces are bathed in crimson and the armies of heaven fall like comets sputtering from the cold dark sky. But every stage of this advance entails an escalating process of simultaneously political and economic combat. Class conflict is always also a struggle under and against state power. In mapping out the contours of capitalist society, then, we can neither avoid the question of the state nor accept it as it immediately appears to us. Just as in the Chinese underworld, the seemingly separate governance of the ten kings of hell can only truly be understood in its relationship to the grander continuum of power that structures the imperial order of our economic cosmology.

1 When There's Blood in the Streets ...

Over the course of the past two decades, Hong Kong has served as an almost perfect illustration of contemporary class conflict, demonstrating both the evolution of an increasingly nihilistic and insurrectionary subjectivity induced by conditions of general fragmentation, stagnation, and deindustrialisation, and the inability of that subjectivity to cohere into anything like class consciousness or even a unified civic identity. The result is an overspilling of suicidal struggles that then reach a limit-point in their paradoxical relation to the state. On the one hand, such struggles exhibit a tendency to overestimate the importance and independence of governmental machinery, treating control over the formal state apparatus and the potential for interstate intervention by the great powers as the ultimate object of politics. On the other, there is a severe failure to apprehend the state as a class institution that spans both

the formal halls of government and the semi-formal sphere of civil society. Both result from the refusal to trace power back to its roots in the property system.

Caught in this paradox, the struggles of the 2010s saw increasingly hollow appeals to civil society, democracy, and 'the people' repeated *ad infinitum* until any remaining programmatic content had been burned out of these prototypical liberal slogans, leaving little more than seething rage. At the practical level, the tragic arc of Hong Kong politics also offers the best single case study of how an ever-aggravating class conflict might play out in a heavily financialised metropolitan zone that is both a crucial axis in the commercial and logistical integration of the global economy and a central interface for the geopolitical conflict between reigning and rising blocs of capital. In retrospect, then, the period stretching from Hong Kong's original Occupy Central movement in 2011–12 through to the spectacular ascent and decisive shattering of the insurrection in 2019–20 proved to be something like a slow, ritual evisceration of the liberal order in a serial reenactment of its Cold War drama, each time performed with additional force and violence by new generations of futureless youth until the costumes of the play had been almost entirely burned away.

The city's confinement within an outdated geopolitical paradigm can ultimately be traced back to its unique political history and its long-standing economic role as a mediator between the mainland and the outside world. The foundations for Hong Kong as we know it today were laid in the latter half of the 1960s, when a mass rebellion drawing inspiration from the Cultural Revolution took shape against British Rule.[10] In 1966, a wave of aggressive protests broke out, culminating a year later in the 1967 Hong Kong riots, which saw massive strikes accompanied by city-wide street battles against police, the bombing of government offices, and targeted attacks against right-wing media outlets. The rebellion went on for some 18 months and, upon its defeat, millions of dollars of property had been destroyed, five thousand people had been arrested, two thousand had been convicted, several protestors and a few police officers had been killed, organisers were deported to the mainland, and the mass organisations that had led the unrest disbanded.

10 Hong Kong had been under British sovereignty since the Qing Dynasty's defeat in the First Opium War in 1842. It became a crown colony in 1843. The territory under British rule expanded in the aftermath of the Second Opium War in 1860 (which added the Kowloon peninsula) and in 1898, when the British signed a 99-year lease over the New Territories (which, after their inclusion, comprised more than 80 percent of the city-state's territory and more than half of its population).

The colonial government's response was not simply repressive, however. The rebellion had been firmly rooted in popular discontent. Strikes were easily fomented in industries like shipping, textiles, and cement production, where wages had long been low and working conditions poor despite a massive boom in the output and profits of the manufacturing sector from the 1950s onwards. Similarly, prohibitively expensive housing had left the poor to live in overcrowded slums prone to regular cholera outbreaks, the most infamous of which were floating villages of boat-dwellers, estimated to house some 150,000 people by the early 1960s.[11] These problems were undergirded by a colonial property system in which 'land was subject to common ownership but government auction,' forcing formal housing development to operate through British-dominated channels and, given extremely rapid in-migration and a subsequent demographic boom after the war, essentially ensuring a massive growth in homelessness and informal settlement, such that 'there were altogether about three million people without a place to live in the 1970s.'[12]

Part of the administration's response to the riots was therefore a massive expansion of the welfare state and the implementation of wide-ranging social reforms, enabled by the beginnings of the city's industrial boom. By the late 1960s, 'rapid economic growth had given the government the necessary resources to expand the civil service and fund new expenditures for social services.'[13] In large part, the success of these policies in Hong Kong followed the standards first set in Japan and Western Germany, and then in South Korea, Singapore and Taiwan, where local governments were encouraged by the reigning postwar powers (and often given substantial material support) to conduct more expansive reforms of welfare, land tenure, and legislative systems in order to stave off the threat of homegrown communist insurgencies in the areas most exposed to Soviet and Chinese influence. The Cold War strategy of containment therefore set the basic foundation for both industrialisation and the localisation of governance in Hong Kong.[14] Meanwhile, the scale and severity of the unrest helped break through the usual resistance of local businessmen and finally allowed reform-minded colonial administrators (many of them Fabian socialists) to push through a series of new policies, including public assistance for the poor, compulsory universal public education, the installation of an anti-corruption agency, and the creation of rudimentary social service departments.

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11 Van De Linde, P.A.M. and Forbes, G.I. 1965 'Observations on the Spread of Cholera in Hong Kong, 1961–1963', *Bulletin of the World Health Organization*, 32, pp. 515–30.

12 Jiang 2017, pp. 18–19.

13 Tsang 2004, p. 171.

14 For an overview of the process in Asia, see: Glassman 2019.

The state's economic surplus also allowed it to 'invest in highly desirable non-essential major infrastructural projects like the Cross-Harbour tunnel' while simultaneously expanding 'public expenditure substantially in housing, health services, higher education and the civil service on a scale unimaginable a decade earlier.'[15] These policies were modelled, in part, on experiments elsewhere, with 'the British Hong Kong government send[ing] officials to Singapore in order to learn from the institutions founded by Lee Kuan Yew …,' and a special emphasis placed on local-level mechanisms for political consultation and planning in the absence of full democratisation.[16] The most spectacular of the new social welfare policies was the 'Colony Outline Plan,' which proposed to house nearly a million people in state-built public apartment complexes, resulting in what would become 'the world's largest public housing system, accommodating more than half of Hong Kong's population.'[17] Though ostensibly a public works program, the plan also benefited from the fact that 'the government's main revenue came from selling Crown land for private development,' which had kept property taxes low and ensured that the public-private partnerships necessary to oversee construction were not only already in place, but also poised to profit off the indirect effects of the building boom.[18]

At the same time, 'various legislative amendments to reduce working hours for industrial workers' were introduced, moderate wage increases were rolled out across the manufacturing sector, and political enfranchisement was slowly but steadily expanded, with the number of individuals eligible to vote doubling between 1970 and 1980, elections expanded to local districts in the early 1980s, and the share of elected seats in the Legislative Council (abbreviated as LegCo, the city's major legislative body) increased in a series of reforms from the mid-1980s up until the handover in 1997, when sovereignty over the city was returned to the mainland.[19] Though these reforms continued under the new system of Chinese administration – which officially treats Hong Kong as a 'Special Administrative Region' (SAR), preserving the city's local legal and legislative systems, its currency, and its autonomous participation in a number of international organisations such as the WTO, all in accordance with the principle of 'one country, two systems' – the city never saw full democratisation. Instead, enfranchisement first targeted the nascent class of Hong Kong capit-

15 Tsang 2004, pp. 171–172.
16 Jiang 2017, p. 11.
17 Hung 2022b, p. 154.
18 Hung 2022b, p. 30.
19 Tsang 2004, p. 172.

alists that had begun to distinguish itself from British business interests and, second, focused on selectively incorporating the ascendant professional strata into the new consultative mechanisms.

This was accompanied by wide-ranging cultural and educational campaigns designed to win the 'hearts and minds' of the populace and to recruit new factions of local elites into the emerging infrastructure of governance, in line with the phasing-out of British imperial rule elsewhere:

> As a result, 'decolonization' contained two opposite processes. On the surface, it was a process of the suzerain gradually giving up its direct colonial regime in a process of democratization. In actuality, it was a process of grooming political elites in the colonies for leadership by means of an imperial education, for maximum preservation of its economic and strategic interests.[20]

Both the emerging university system and the city's common law legal institutions accommodated this process, not only generating a sense of cultural identification with the British but also guaranteeing that 'only the political elites educated in the British ways knew how to operate the systems and were able to take over the controls.'[21]

The city thereby took on a distinctly corporate character, with the first series of seats added to the LegCo not open to direct election but instead voted on by members of 'functional constituencies,' representing different trade and sectoral interests – initially, these were the commercial, industrial, financial, labour, social services, education, legal, medical, and engineering constituencies.[22] Similarly, after the handover, the city's top administrative post was no longer that of the colonial Governor, but instead a Chief Executive selected by an Election Committee of around 800 members, the majority of whom were nominated in a similar fashion to functional constituencies.[23] The overall character of such governance in Hong Kong has been described

20 Jiang 2017, p. 49.

21 Jiang 2017, p. 50.

22 Cheung, Gary 18 January 2010 'Functional seats plan mooted a month after Deng, MacLehose met', *South China Morning Post*. https://www.scmp.com/article/704030/functional-seats-plan-mooted-month-after-deng-maclehose-met

23 The Election Committee was also tasked with directly appointing a portion of LegCo seats (10 of 60 in the first post-handover election in 1998). Though this policy was phased out in 2004, it was recently revived in the electoral reforms of 2021, after which 40 of 90 total seats would be selected by the Election Committee.

as the 'administrative absorption of politics,' in which direct political representation was suppressed in favour of opening administration to more limited forms of political participation and consultation.[24] For example, in the wake of the riots, 'the government took the lead to improve the channels of communication and introduced City District Officers' and, from this basis, built 'up a wide network of advisory committees and district boards to provide scope for increasing public participation.'[25] The goal was a 'consensus government' where the government, via its 'expanding network for collecting and responding to public opinion [thereby] avoided public agitation for democratisation.'[26]

The absorption of politics within this consultative system of administration took place in multiple stages, with the build-out of the LegCo a relatively late addendum. First, it built on existing precedents. Local community organisations had long been incorporated into the colonial system of indirect rule, creating a distinct stratum of local Chinese elites as early as the nineteenth century. These elites thereby served as important partners able to convey high-level policy measures to local communities. Second, the recruitment of Chinese residents into the civil service had already begun after the end of the Second World War, providing the necessary foundation for its rapid expansion in subsequent decades. Third, a certain portion of the grassroots political momentum that underlay the riots was slowly absorbed into the new social welfare and civil society structures instituted in their aftermath in the 1970s and 1980s.[27] The formal consultative and advisory bodies constructed in the years leading up to the handover were simply the final stage in this process, with the reform of the LegCo and creation of a Chief Executive role putting an official stamp on the long-standing trend toward administrative absorption. By the time of the first post-handover LegCo elections in 1998, only 20 of 60 seats were elected by popular vote (referred to as 'geographical constituencies'), with the majority selected by either functional constituencies (30 seats) or the Election Committee (10 seats). Though the portion of seats open to direct election increased in subsequent years (to 24 in 2000 and 30 in 2004), by 2016 functional constituencies still selected 30 of the 70 total seats, with only 35 selected by geographic

24 The theory of the 'administrative absorption of politics' was first put forward by the sociologist Ambrose Yeo-chi King as a description of the British colonial system in the 1970s. (King, Ambrose Yeo-chi 1973 *The Administrative Absorption of Politics in Hong Kong, with Special Emphasis on the City District Officer Scheme*, The Chinese University of Hong Kong Social Research Centre, Hong Kong: Occasional Paper, No. 25)

25 Tsang 2004, p. 207.

26 Tsang 2004, p. 208.

27 Jiang 2017, p. 3.

constituency and five nominated by district councillors (who were themselves directly elected).[28]

2 ... Buy Property

The unrest of the late 1960s also accelerated a series of economic transformations that would undergird the reform of the political system. In some cases, these changes were already well underway prior to the riots. As early as the 1930s, the fragmentation of the global economy into competing trade and currency blocs had attracted Chinese industrialists from both the mainland and the established diaspora in cities across Southeast Asia seeking tariff-free access to the markets of the British Empire. Excluded from the heavy industries dominated by the British (such as oil refining and shipyards) and from the commercial sectors dominated by local Cantonese-speaking merchants who had long served as the colonial administration's agents of indirect rule, these émigré capitalists instead invested in sectors such as textiles, tools, and machinery. This new industrial base was then bolstered when an influx of refugees fleeing the revolution on the mainland arrived in the latter half of the 1940s, including a second wave of industrialists from Shanghai and Guangzhou. The refugee population provided both a pool of cheap labour and a source of new capital for the postwar expansion of manufacturing: 'The number of registered industrial establishments increased quickly, from 972 in 1947 to 1,522 in 1950.'[29] In the space of a decade and a half, the city rapidly industrialised. By the 1966 census, 'two-fifths of Hong Kong's labour force was engaged in manufacturing' and the figure would grow from there, peaking in 1980.[30]

However, this rapid industrial growth also led to rising inequality among the new migrants and set the stage for the conflict in the 1960s. In the space of the five years between 1945 and 1950, the city's population had risen from roughly 600,000 to over 2 million, and then further to 2.5 million by 1955.[31] Most of these became workers or minor entrepreneurs, but many also brought capital over from Guangdong and Shanghai, which they used as a basis to build out larger businesses. These new industrialists 'usually operated as contract manufacturers,' piloting the networked supply chain models that would later be so important to the export boom on the mainland:

28 Hung 2022b, pp. 74–5.
29 Tsang 2004, p. 161.
30 Tsang 2004, p. 162.
31 Tsang 2004, p. 167.

> Where one manufacturer could not fulfil a larger order it would subcontract a reliable peer to share the work … about 24 per cent of orders for manufacturing came from peer sub-contracting. Small factories could operate as a network of producers as they did not have to compete against each other in the design or marketing of the finished products.[32]

Moreover, initially cut out of the older systems of colonial patronage, this new generation of Hong Kong industrialists exercised a higher degree of independence and retained significant ties to the mainland, which allowed them to lead the first waves of investment in the Pearl River Delta in the 1980s. Meanwhile, the unrest itself created lucrative conditions for these new businessmen to quite literally buy up large portions of the city. Li Ka-shing, a refugee from Chaozhou (a city on the border of Fujian and Guangdong) who had started a Hong Kong plastics factory in the 1950s, used the profits from his factory to purchase valuable tracts of downtown land at bargain prices from residents fleeing the unrest in 1967. By the turn of the century, Li had become the richest man in Hong Kong and, for a while, all of Asia.

Li's ascent also illustrates how local business interests gradually displaced British conglomerates not only in the (soon-to-be-offshored) manufacturing sector but also in finance, real estate, and logistics, which would go on to become the centre of Hong Kong's economy after deindustrialisation. Li's foray into real estate soon proved far more lucrative than his original manufacturing plant. He consolidated his post-riot purchases in a new development company named Cheung Kong Holdings, which was listed on the Hong Kong Stock Exchange in 1972. At the time, the city's leading real estate firm was Hongkong Land, owned by Jardine Matheson (usually shortened to Jardines), a British conglomerate that moved its headquarters to Hong Kong in 1842, immediately after the First Opium War. By the 1970s, however, Jardines had largely stopped developing new real estate in the city, content to collect rent from its existing office buildings and expand its business in other parts of the world. In this context, Cheung Kong was able to bid on new development properties with little competition, building up its portfolio just as the city's real estate market began to take off. A brief slump in 1983 hurt both Cheung Kong and Jardines but, since its revenues had already been constrained, Jardines was much harder hit. The conglomerate reduced its stake in Hongkong Land between 1986 and 1987, triggering the first of several hostile takeover attempts by Li, backed by other ascendant Hong Kong businessmen such as Lee Shau-kee and Cheng Yu-tung.

32 Tsang 2004, p. 168.

The 1987 Black Monday crash jettisoned the deal, however.[33] Meanwhile, fearful of such attempts and concerned about the prospect of the sovereignty handover, Jardines had already partitioned its shareholding structure and moved its legal headquarters from Hong Kong to Bermuda.

Though another takeover attempt occurred in the 1990s, the defeat of the established British business interests ultimately occurred not through direct assaults but instead in a slow and often amicable retreat. As negotiations for the handover began, old colonial interests like Jardines began to diversify their portfolios, funnelling more of their new investment to other emerging markets in Southeast Asia or the booming corporate and real estate sectors in the US. Though they retained large holdings in the city – to this day, Jardines is a major property owner – their relative inactivity created a vacuum that was soon filled by the ascendant bloc of Hong Kong capitalists. Nor was Li's case unique:

> Indeed, with the exception of a couple of the long-established and successful British hongs like Swire and Hong Kong Land (part of the Jardine group) as well as a few large local landowners like the Hotung family and the Hysan group, most of Hong Kong's top business conglomerates of the 1990s were built on the basis of bold investments in real estate development in this period.[34]

Meanwhile, in finance, the relationship was essentially symbiotic, with leading British firms like HSBC linking Hong Kong businesses to the City of London and fostering the ascent of local firms such as Hang Seng. HSBC acquired a stake in the latter company in order to save it from a bank run in 1965, helping to launch the Hang Seng Index in 1969, listing the firm on the Stock Exchange in 1972, and financing Hang Seng's expansion into China in the mid-1980s.

British trading companies had also long dominated shipping and logistics. Here, the process was similar to that seen in real estate, but also more decisive. Li again played a central role, with Cheung Kong acquiring Hutchinson Whampoa – one of the hallmark British trading companies – in 1979, thereby taking ownership over a massive portfolio of retail ventures and real estate assets as well gaining as effective control of key logistics businesses, including the Port of Hong Kong.[35] Similarly, in 1985 Li purchased Hong Kong Electrics, the main

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33 SCMP Reporter 10 August 1997 'Stake disclosure reopens wounds of old battle', *South China Morning Post*. https://www.scmp.com/article/206987/stake-disclosure-reopens-wounds-old-battle

34 Tsang 2004, p. 173.

35 Vines, Stephen 6 August 2005 'The Other Handover', *Time*. https://time.com/archive/6674252/the-other-handover/

electrical utility for the island.[36] Thus, while Li became best known as an astute asset trader, his actual success had as much to do with his ownership of key infrastructural assets such as the port, the skyscrapers in which the business of finance took place, and the electrical infrastructure powering it all. In a way, Li's ascent within Hong Kong thereby mirrored Hong Kong's own ascent within the global economy. Both were essentially middlemen profiting from their ownership of crucial nodes in the emerging planetary production complex.

Hong Kong was born as an entrepôt city – a transshipment port and trading post where merchandise is imported, stored, traded, and then reexported – designed to displace the Qing Dynasty port in Guangzhou and thereby force mainland commerce into dependence on the trading bloc of the British Empire. Though decades of depression, revolution, civil war, and subsequent embargo and isolation cut the city off from the mainland, when China began to reopen in the late 1970s and Hong Kong factories started to relocate across the border, the city's role as a transshipment centre for both goods and capital was not only revived but became more important than ever. Hong Kong was transformed into the heavenly city of circulation. By the end of the century, it had become perhaps the first true global logistics capital, with its entrepôt expertise priming its warehousers, wholesalers, and port operators for the rapid turnovers, high volumes, and diversity of destinations that would accompany containerisation. In fact, stimulated by competition from Singapore and Japan, Hong Kong's port became one of the first in Asia to accommodate container traffic, with a massive reclamation and redevelopment project undertaken at the very terminals owned by Hutchinson Whampoa in the years before Li's acquisition of the company.[37] This capacity became crucial in the early years of China's integration into the global economy, since the entire product of the mainland's early export industry was funnelled through the Port of Hong Kong. By the end of the 1980s, Hong Kong had thereby risen to become the busiest container port in the world – a rank it held for most years between 1987 and 2004, after which it was displaced by mainland ports in Shanghai, Shenzhen, and Guangzhou, as well as other Asian transshipment centres such as Singapore and Busan.[38]

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36 Hung 2022b, p. 73.

37 Chi-pang, Lau 2016 'Chapter 7.1: The Container Terminals', in *History of the Port of Hong Kong and Marine Department*. https://scholars.ln.edu.hk/en/publications/%E9%A6%99%E6%B8%AF%E6%B8%AF%E5%8F%A3%E8%88%87%E6%B5%B7%E4%BA%8B%E8%99%95%E6%AD%B7%E5%8F%B2

38 The Shipyard 13 September 2022 'History of the Port of Hong Kong: Part 2', *The Shipyard*, 13 September 2022. https://www.theshipyardblog.com/history-of-the-port-of-hong-kong

But Hong Kong was even more central to the circulation of financial capital. The initial opening of the Chinese mainland had been premised on a strict separation between the domestic pricing system (at the time largely still set by state planners) and that prevailing in global markets. Early on, Hong Kong therefore acted as more or less the only major channel through which investment was able to enter the mainland. Firms from Taiwan, the Chinese diaspora, Japan, the US and Europe all had to transit their funds through the city-state, which only reinforced its status as a liminal space that was both part of China and separate from it. Even mainland capitalists made use of this special status, smuggling money to Hong Kong where it was then reinvested into the mainland in a process called 'Round-Tripping,' which allowed domestic capital to benefit from preferential policies set up to attract foreign investment.[39]

Similarly, Hong Kong became a major route for mainland firms to gain access to global capital markets. Both the process of consolidating old state-owned enterprises into modern group company conglomerates and the emergence of private group companies was only possible in collaboration with global investment banks and private equity firms, often operating through Hong Kong. Rising Chinese conglomerates usually completed their corporatisation with listings on the Hong Kong Stock Exchange. In many cases, companies then relocated their headquarters to Hong Kong or spun off subsidiaries in the city to provide better access to both global capital markets and the city's own agglomeration of high-level financial and producer services. When mainland companies began to go overseas beginning in the late 1990s, they often did so through Hong Kong-registered subsidiaries. Finally, while the rise of mainland financial centres such as Shanghai were once widely perceived to be threatening Hong Kong's role as China's 'offshore' financial centre, the redoubling of fiscal and financial protections on the mainland in the 2010s – and especially after the stock market turbulence of 2015–16 – has only reinforced Hong Kong's importance as an administrative centre for global accumulation. This has left Hong Kong as the most feasible route for ongoing attempts to internationalise the *renminbi* and as an important hub financing overseas construction and engineering projects.[40]

-part-2/

39 Xiao Geng July 2004 'People's Republic of China's Round-Tripping FDI: Scale, Causes and Implications', *Asia Development Bank Institute Discussion Paper*, No. 7. https://www.adb.org/sites/default/files/publication/156758/adbi-dp7.pdf

40 Hung 2022b, pp. 47–71.

3 Hostile Brothers

Given its fuzzy sovereignty, incomplete reform, and uniquely intermediate position within the planetary factory, Hong Kong at first seems to be a poor case from which to extrapolate any general insights on the nature of state power within capitalist society. However, the very hybridity and porousness of the city – simultaneously colonial, Chinese, and a shifting amalgam of local (Tanka, Cantonese, Hakka, Teochew and now 'Honger Konger') identities, all interwoven with both global capital networks and regional ties of kinship and trade – is precisely what allows it to serve as an illustration of the general rule. In other cases, the national character of the state can tend to obscure its more essential function as an emanation of class power. By contrast, Hong Kong's state has thrived on the periphery of national projects and always fallen under the military umbrella of greater powers. As a result, the relationship between governance and the competitive-cooperative struggles of various capitalist class fractions operating in and through the city is especially transparent. Again, this is clear enough in the simple fact that half of its main legislative body has, on average, not been directly elected by 'the people' but by functional constituencies that operate like miniature chambers of commerce, with a Chief Executive who runs the city much as any CEO might oversee boardroom squabbles. It is for this very reason that the city, or at least a certain fanciful image of it, played such a central role in the lore of 'neoliberalism,' with Milton Friedman praising it as a model of the 'free market' despite its absence of sovereignty, lack of political freedoms, and active urban and financial planning conducted by elite consortiums of bureaucrats and businessmen.[41]

Similarly, since Hong Kong has served as a nexus in all the major territorial-industrial transformations of the past half century, it offers a clear picture of otherwise subtle changes in the relative power of different fractions of the global capitalist class, from which emanate the industrial policies and economic 'models' that then take on the appearance of autonomous state strategies. Both the physical and cultural proximity of the city to the mainland also ensured that Hong Kong – alongside Taiwan and the business conglomerates of the Chinese diaspora in Southeast Asia – provided not only literal capital to nascent industrialists in China but also an instructive example of how to foster a deliberative system of urban governance that forges a loose consensus out of the negotiated interests of individual firms while also cultivating a climate conducive to accumulation in general. Just as certain features of

41 For an overview of Hong Kong's role in the neoliberal imaginary, see: Peck 2021.

Taiwanese law and industrial organisation would be replicated and even amplified on the mainland, then, so too would Hong Kong's financial innovation and corporate governance (especially in private equity and real estate) provide examples for the emerging generation of capitalists across the border.[42] Soon after absorbing these lessons, the ascendant bloc of mainland capitalists would overtake their teachers, constructing an institutional environment that was extremely conducive to accumulation, thereby helping to gestate new generations of hyper-competitive firms.

But the deeper question remains: if the firm is something like the cellular unit of capitalist society, why is there any need for forms of governance superseding those that already exist between firm and firm, either in the form of vertical integration via mergers and acquisitions or in the form of horizontal market linkages within the supply chain? At most, it seems as if standards might be necessary to coordinate between the firm and the individual human beings who act at any given moment as its owners, employees, or, in some cases, the consumers of its goods. Beyond this, however, it is not immediately evident why something like a state would be a logical necessity within capitalist society. Could it not be a vestigial leftover of historic oppression, set to wither away much as market fundamentalists like Friedman have claimed?

In more theoretical terms: if capitalist power is rooted in the mute compulsion of the market, why does it overspill those bounds and come also to encompass both the overt violence and covert coercion of the state? Moreover, why does this supersessive power then take on the appearance of a universal governing authority that represents the entirety of the national-civic body ('the people') and thereby seems to sever 'political' from 'economic' power? Following from this, why do the resulting institutions then find their growth limited but never nullified, such that capitalist society trends neither toward statelessness nor toward the formation of a single global state but instead produces and reproduces a distinct system of interstate governance that expresses uneven development as geopolitical conflict and thereby conceals the simultaneously imperial and integrated character of planetary production under an alienated image of a disjointed clash between nations? And finally: why does this pro-

42 While Hong Kong helped to set certain standards for corporate governance, Taiwan was more important as a model for the judicial system more generally. Taiwanese consultants were essential to the construction of the PRC's civil code, criminal code, and company laws from the 1990s onward. Though the direct inspiration for these new legal systems were those of Germany and Japan, Taiwan already had a vast pool of Mandarin-language laws and scholarship influenced by the German and Japanese legal frameworks. (Rigger 2021, pp. 109–27; 169–70)

cess take on a specifically territorial character, such that the ensuing spheres of 'state' and 'market' activity are then bordered in space, as specific states governing specific markets?

In attempting to feel out the shape of the world-encircling monster, we have seen again and again how its initial or common-sense appearance acts as a sort of ink-cloud obscuring both its inner workings and underlying unity. In the previous chapters, we also found that this unity can only be explained when these surface dynamics are understood as epiphenomena of value, the distinctly capitalist form of social domination. It is not coincidental, then, that one of the recurring features of the alienated concepts that form our common-sense understanding of the world is that they tend to veil the sphere of production. The question of 'law,' 'politics,' or simply 'the state' is no different. In fact, here we find maybe the most extreme expression of alienation, insofar as these categories are quite literally defined by their claim to describe specifically 'non-economic' institutions. But the law of value ultimately supersedes that of the state. As Simon Clarke explains:

> … we have to look behind the institutional separation of economics, law and politics to see money, law and the state as complementary economic, legal and political forms of the power of capital. The underlying unity of these differentiated, and complementary, forms of capitalist power was explained by Marx's theory of value, the three aspects being united in capitalist property, money representing the most abstract form of capital, whose power is institutionalised in the law and enforced by the state.[43]

Meanwhile, the 'power of capital' is, at its core, the power of production itself – power over the means of production, power exerted over others in production, and the power to reshape the physical world to compel the unending production of value.

Though individual capitalists and corporations obviously wield immense personal and institutional power, the power of capital as such is not simply the aggregation of these individual interests. It is instead a more expansive social power that disciplines and constrains the interests of individual industrialists just as much as it embodies them. William Clare Roberts therefore breaks the 'economical conditions of class rule that accompany the wage system' down into three distinct elements of domination: 'the *political domination* of the workers effected by the state, the *objective domination* or despotism to

43 Clarke 1988, p. 15.

which workers are subjected in production, and the *impersonal domination* experienced by all commodity producers.'[44] The role of governance is obvious in the case of political domination. But all three are essentially forms of class rule and therefore involve various types of direct and indirect governance that operate both vertically, regulating the relationship between classes, and horizontally, governing intraclass relationships between different fractions of workers or capitalists. In the case of objective domination, for example, underlying institutional systems managing employment, citizenship, public health, and environmental pollution all play a role in structuring the way that domination operates within the workplace. Even in the case of impersonal domination, power manifests through the systems of money and property that both enforce and compel the accumulation of value, thereby subordinating society's productive capacities to the reproduction of capital. The ability of economic power to act as an ambient form of compulsion is therefore premised on the existence of specific institutions necessary to the maintenance of the commodity system.

Often, this governance is indirect and seemingly self-generating, as in the function of market competition in the disciplining of individual firms. As Clarke argues, 'the role of the market is precisely to mediate the contradiction between the individual interests of particular capitals and their interest as parts of social capital.'[45] But the market itself is also a facet of governance in a more direct sense:

> Unless the authority of the market is imposed on all particular capitals they will individually and severally seek to overcome the barrier of the market by suppressing competition, by fraud and, *in extremis*, by force. Thus the authority of the market can only be maintained by an external power that can meet force by force.[46]

In other words, the state. And, more specifically, a state that 'secures the general interests of capital in the first instance not by overriding the rule of the market, but by enforcing the rule of the money and the law, which are the alienated forms through which the rule of the market is imposed not only on the working class, but also on all particular capitals.'[47] This is a manifestation of class rule in the sense that it expresses the power of capital in general, rather than just that of individual capitalists. In other words, the state is not just a

44 Roberts 2016, p. 235, italics in original.
45 Clarke 1988, p. 123.
46 Clarke 1988, p. 124.
47 Ibid.

boardroom in which the conflicting interests of different factions of capital are reconciled through some combination of scheme and threat (though it is often this as well). It instead secures the reproduction of capitalists as a class by enforcing the impersonal rule of money, property, and law necessary for the market to function – even if this sometimes entails enforcing that rule *against* capitalists themselves. More fundamentally, then, the 'class character of the state' lies 'in the duality of money and the state as the complementary forms of existence of capital-in-general.'[48]

In the same way that the supply chain is defined by simultaneously competitive and cooperative dynamics between firms, individual capitalists find themselves forced to coexist with one another in an uneasy alliance. Though unified in their role as appropriators of socially-produced value, they nonetheless find themselves divided in the private nature of this appropriation. These divisions are only aggravated when the process of valorisation from which all profit is derived stalls or otherwise falls into crisis. Marx explains it in terms of a warring band of brothers:

> So long as things go well, competition effects an operating fraternity of the capitalist class, as we have seen in the case of the equalisation of the general rate of profit, so that each shares in the common loot in proportion to the size of his respective investment. But as soon as it no longer is a question of sharing profits, but of sharing losses, everyone tries to reduce his own share to a minimum and to shove it off upon another. The class, as such, must inevitably lose. How much the individual capitalist must bear of the loss, i.e., to what extent he must share in it at all, is decided by strength and cunning, and competition then becomes a fight among hostile brothers. The antagonism between each individual capitalist's interests and those of the capitalist class as a whole then comes to the surface, just as previously the identity of these interests operated in practice through competition.[49]

The familial metaphor is particularly significant here. In a direct sense, it illustrates the idea that 'horizontal' power relations within the capitalist class are defined by the intimate cruelties, scheming alliances, and visceral betrayals of family politics. But the allegory also implies a second aspect in which the unity of kinship overrides internal feuds whenever the lineage faces an external

48 Clarke 1988, p. 125.
49 Marx 1959, p. 178.

threat. It is a familiar trope: rival siblings who constantly deceive, assault, and insult one another only to discover their unbreakable bond when one is attacked by an enemy clan. In this way, the metaphor also makes an argument about the nature of the 'vertical' power relations that hold between the capitalist class (as a hostile family) and its enemy house, the proletariat.

But the two great class clans are not on equal footing, nor are they truly separate, insofar as the survival of the warring family of the bourgeoisie fundamentally depends on the active subordination of the proletariat, which is precisely why the latter is treated as an exile tribe. Keeping with our theme we might think of the bourgeoisie as something like a dynasty of vampires cloistered in its fortified palace high in the dark reaches above a mountain hamlet. The proletariat, of course, is the population of humans on which these vampires feed – not only a non-sanguine and rival clan but also an entirely dependent bloodline that is actively exsanguinated by exploitation, the defining relationship between the classes. Some humans of course collaborate, becoming fanatic familiars of the exploiting class. A small fraction may even win entry into the dark palace itself through their service, insofar as they allow themselves to be remade into monsters.

And the dependence goes deeper still, because the coven of vampires does not simply feed on the humans of the village but must also ensure the transformation and reproduction of the human population itself. While the bloodhunger of each individual vampire would, if unregulated, drive it to drain the last drop from its stock, the tribe as a whole must mobilise, restrain, and coordinate its fraternal competition in such a way that the lifeforce on which it feeds is not only preserved but multiplied, allowing for more intensive exploitation. As a result, the vampires must not only raid humanity from afar but are eventually driven to domesticate it. And yet the multiplication of the subordinate population is itself a threat, since the proletariat is still essentially a foreign enemy. Thus, this vertical aspect of class rule also requires a more extensive governance of the domesticated population, secured both through redoubled terror and repression and through increasingly baroque and bureaucratic divisions that etch new hierarchies into the subordinate class itself, resulting in a proliferation of entrepreneurs and collaborators seeking someday to ascend to their own seat in the great court of the leech.

4 Competition as Crisis

Economic, political, and ecological crises serve as crucial mechanisms through which this intra-capitalist conflict is intensified and the reigning order is forced

to restructure around new firms, new product lines, and new geographic centres. Though the aforementioned shift toward retail and tech was foreshadowed by the rise of logistics-and-retail giant Wal-Mart and earlier tech conglomerates that had survived the dot-com bust in the early 2000s, such as Microsoft, it was again the Great Recession that marked the major turning point. In the wake of the crisis, General Motors fell into bankruptcy and was effectively purchased by the US government (which then sold its shares at a loss later in the decade), General Electric began a frantic sell-off of its many financial assets and underperforming manufacturing lines (before being split into three separate companies in the early 2020s), all while Ford and Boeing regrouped around their core industries and suffered years of stagnant growth, with Boeing becoming only more dependent on government contracts, public loan guarantees and various direct federal and state subsidies for survival as the years went on. Meanwhile, companies like Amazon, Apple, and Alphabet slowly displaced all the major manufacturers from the upper rungs of the US Fortune 500. Within finance, the fall of firms like Lehman Brothers, Merrill Lynch, Bear Stearns, and Washington Mutual, alongside the federal takeover of Fannie Mae, Freddie Mac, and American International Group, not to mention the near-mortal wounding of Goldman Sachs, cleared the ground for the ascent of the new hedge funds, asset management firms, and of course the monstrous hybrid JPMorgan Chase, now the 'apex predator' of the US banking industry.[50]

Within world manufacturing, the decline of the older US industrial conglomerates also saw established competitors like Volkswagen and Toyota buttress their positions while new leaders such as Samsung and Foxconn rose into the upper rungs of the corporate hierarchy. By 2022, all four had ascended to outrank all US manufacturing firms in the Global Fortune 500 aside from companies like Apple and Microsoft (neither of which own any factories and are only marginally 'manufacturers' in the strict sense of the word).[51] Despite

50 Tooze, Adam 6 May 2023 'Chartbook #213 Expanding the fortress: Why JP Morgan is even more important than you think!', *Chartbook*, Substack. https://adamtooze.substack.com/p/chartbook-213-expanding-the-fortress

51 Arguably, Amazon, Costco, and Wal-Mart could be added to the list on similar grounds, since they technically oversee their own budget brands. Amazon, in particular, now produces a massive range of items under various private brands available on its platform. But the company produces none of these products in house. Instead, it makes use of contract manufacturers located all over the world. As of 2024, the highest concentration of suppliers is still in China. The Chinese share has, however, declined slightly into the 2020s, while the share of suppliers in South and Southeast Asia has risen. The data is available in semi-regular supplier reports and, at least as of 2024, in a searchable map available here: https://opensupplyhub.org/facilities?contributors=1078&lists=3316&sort_by=name_asc

warnings of an imminent threat from Chinese competitors, the sole mainland manufacturer sitting in the top 50 in that same year was Baowu Steel (ranked 44, far below Foxconn, at 20). Chinese firms instead led in energy, finance, and construction, alongside other major state-owned conglomerates such as Saudi Aramco and established energy and finance multinationals like ExxonMobil and Berkshire Hathaway.[52] These shifts within the hierarchy of accumulation were, of course, accompanied by territorial transformations. Within production, this had long been visible in the emergence of new manufacturing territories across East Asia, supplying the cheap goods sold by the major retailers and leading brands. But a simultaneous transformation occurred within the geography of the US itself, where rapid urban development and skyrocketing real estate prices tracked the ascent of new centres of accumulation such as Silicon Valley, Seattle, Austin and Atlanta alongside the continuing descent of the rust belt cities of the Midwest and Northeast. In the EU, something similar occurred, dividing the debt-laden Mediterranean states and declining rural areas in the French, Italian, and Iberian hinterland from dynamic production centres in Eastern countries such as Poland, the Czech Republic, and Hungary, which essentially operated as back-of-house industrial sites for lead firms headquartered in wealthier tech-and-finance hubs in Western Europe.

Thus, rather than a rivalry between national blocs, it is more accurate to picture the factional conflicts that take shape between individual capitals as first and foremost a regional and sectoral affair playing out within the countries already at the top of the imperial hierarchy. For the most part, new lead firms emerge within these national markets not through direct competition within established lines but in entirely new or reinvented industries (including financial ones, such as asset management) that prove capable of siphoning more and more of the total pool of value. Thus, aided by crises, the ascendant blocs undercut elder firms laterally, rather than in a head-on competition within established product lines. These conflicts then spill out into the emerging territories as similarly ascendant foreign competitors profit from the new alignment of power – in some cases as ancillaries (Foxconn), in some as outright competitors (Samsung), and in still other cases as the serendipitous beneficiaries of their rivals' downfall (Volkswagen, Toyota, Hyundai).

52 The Fortune 500 rankings used here rely on revenues to rank companies and give a very rough sense of how much value is flowing through certain companies relative to others in any given year. Ranking by market capitalisation is the other common metric (used in the Financial Times 500), but this method tends to exaggerate the position of firms with low revenue relative to their stock price (i.e. Tesla), conflating speculative valuation with firms' more concrete economic activities.

As the old manufacturing monopolies are unsettled and forced to regroup around their highest-value product lines, the overseas firms that they had once employed as subcontractors or formed joint ventures with then gain a certain autonomy, able to mobilise cheaper costs and ample access to credit both to expand their foothold within their own domestic markets and to internationalise their operations, often by acquiring the lower-end product lines shed by the established monopolies. It was in this fashion that IBM sold off its computer manufacturing business and x86 server lines to Lenovo, while GE sold its appliance business to Haier. Similar acquisitions also marked the ascent of Japanese firms in the 1980s, with Bridgestone acquiring its US rival Firestone to become the largest tire manufacturer in the world and Sony entering the entertainment industry through its acquisition of CBS Records and Columbia Pictures. Only in this way do factional conflicts within the upper rungs of industry generate something like an ascendant national bloc elsewhere, as a second-order effect of the reorganisation of the corporate hierarchy *within* leading countries.

Crises therefore play a dual role. First, they legitimately unsettle the corporate order within the wealthiest countries, driving established firms to bankruptcy and drawing new challengers into the lead. The crisis also propagates down the supply chain, restructuring production networks to accord with this new order. But even though this process tends to spawn a certain mythos of decline, crises more often reinforce the overall position of the leading national blocs. Even when they strike in the heart of the metropolitan core, they simply pose opportunities for certain companies to buy up assets on the cheap, much as BlackRock did in the wake of the Great Recession. Similarly, crises also exert a disciplining force, often a far stronger one, on blocs of capital further down the chain. For example, while the hegemony of US multinationals has, since the very beginning of the postwar period, served to build up new centres of accumulation in East Asia and continental Europe so too have these ascendant centres been repeatedly forced back into subordinate positions by some combination of the raw political power wielded by the established conglomerates and the destabilising forces attending the unchecked growth of these ascendant firms themselves.

This is evident in the two major crises that capped the last century: the bursting of the Japanese asset bubble in the early 1990s and the Asian Financial Crisis at the end of that decade. In Japan, US multinationals had long lobbied for intensified tariffs and a forced revaluation of the yen against the dollar. These demands were met in a series of intensified trade war policies beginning in the 1970s and culminating in the Plaza Accord of 1985, which saw the yen rapidly inflate to the detriment of Japanese manufacturers: 'As a

share of the world total, Japan's exports plunged sharply from a peak of 10.3 per cent in 1986 to 8.5 per cent in 1990.'[53] Within Japan itself, the profitability of manufacturing had already begun to decline as early as the 1970s, as industrial firms invested in vast expansions of plant and equipment (alongside speculative land deals) that built up capacity in a global market already heading towards a glut, resulting in 'a chronic tendency to excess-production in multiple product lines.'[54] The Plaza Accord simply tipped already stagnating profit rates into freefall. In response, even more money flowed into assets, hyper-inflating the real estate bubble that then burst in the early 1990s. The crash initiated a period of sustained stagnation known as the lost decades, during which the rapid ascent of Japanese firms to leading global positions was stalled and ultimately reversed. In 1989, of the world's top 10 most valuable companies (by market capitalisation), six were Japanese and, by 2022, none were.[55]

Similarly, the Asian Financial Crisis was triggered, in part, by bets made against the currencies of Thailand and Malaysia by US hedge funds, foremost among which were major funds overseen by financial billionaires Julian Robertson and George Soros.[56] At a larger scale, the crisis was also related to changes in the relative prices of different currencies, in which US macroeconomic administration played a central role: 'The struggle for markets in a global manufacturing sector that remained haunted by over-supply continued to take the form of a zero-sum struggle, with winners and losers determined heavily by the movement of exchange rates.'[57] Initially, firms in South Korea and Southeast Asia had benefited from the Plaza Accord. The declining competitiveness of manufacturing in Japan encouraged Japanese manufacturers to offshore more production to these ascendant centres:

> Between 1991 and 1995, annual Japanese manufacturing direct investment in East Asia almost tripled from $2.9 billion to $8.1 billion, and … the share of Japanese exports going to East Asia [increased] by 40–50 percent in the same short period. Japanese consumer goods imports from the region

53 Brenner 2002, p. 110.

54 Brenner 2002, p. 101.

55 Steiger, Paul E. 29 April 2014 'What a difference 25 years makes', *CNBC*. https://www.cnbc.com/2014/04/29/what-a-difference-25-years-makes.html

56 Rupert Hargreaves 6 September 2016 'Here's how George Soros broke the Bank of Thailand', *Insider*. https://www.businessinsider.com/how-george-soros-broke-the-bank-of-thailand-2016-9

57 Brenner 2002, p. 159.

> simultaneously rose almost as rapidly. Massive Japanese bank lending to East Asia, both to Japanese multinationals and locally owned firms, lubricated an already tumultuous process of development.[58]

Meanwhile, since countries like Thailand and South Korea had pegged their currencies to the dollar, when the Plaza Accord devalued the dollar relative to the yen, the baht and the won followed suit, effectively decreasing the cost of these countries' exports and thereby increasing the competitiveness of their manufacturers.

Though this at first helped to stimulate real growth in their manufacturing sectors, it also encouraged speculation on global capital and currency markets. In order to obtain smoother access to global liquidity, South Korea and most of the countries in Southeast Asia (though notably not Singapore, Taiwan, or mainland China) had gradually opened their financial markets to foreign investors. Soon, relatively speculative portfolio investments from overseas began to exceed direct investment in industry, such that 'the Japanese bubble had, in effect – with the help of 'emerging market' investors from around the world – been resurrected in East Asia …'[59] Meanwhile, in response to the risk of a global depression, the US helped to engineer what Brenner calls a 'reverse Plaza Accord' in the mid-1990s, dropping campaigns to further break down Japanese tariffs and instead coordinating with Japanese officials 'to take joint action to force down the yen … and elbow the dollar upwards,' in part by raising interest rates in the US and lowering rates in Japan while also 'enlarging Japanese purchases of dollar-denominated instruments such as Treasury bonds.'[60]

In South Korea and Southeast Asia, however, the result was that dollar-pegged currencies like the won and baht also began to experience inflation. The profitability of manufacturing – which had already grown stagnant due to massive investment in new plant and equipment, aggravating overcapacity – subsequently plummeted, initiating a series of bankruptcies and corporate restructurings:

> From the beginning of 1997, a long succession of Korea's leading *chaebol* went bankrupt, evidencing the extremity of the situation. As loan defaults began to pile up, funds started to quit the region – far more rapidly than

58 Brenner 2002, p. 156.
59 Brenner 2002, pp. 161–3.
60 Brenner 2002, p. 131.

> they had entered … Equity prices now began to crumble, accelerating the outflow and making for downward pressure, and soon speculation, on local currencies.[61]

In Thailand, conditions were almost identical:

> The state facilitated both the original boom in manufacturing FDI that led to record growth rates during 1988–90 and the dramatic inflow of hot money during 1993–4 as the manufacturing sector cooled somewhat and investors began to look elsewhere. The phase of open crisis began with the collapse of real estate values and manufacturing export growth during 1996, which led to disinvestment from the stock market and speculative pressure on the baht …[62]

This pressure was aggravated by US hedge funds betting against the Thai baht, which helped to trigger the crisis even if they did not cause it. Rather than a conspiratorial or speculative effort to bleed the Thai economy, then, the shorting of the baht by US hedge funds was instead a matter-of-fact appraisal of the risk already accumulated in the system. The overall result was therefore a disciplining of ascendant firms from 'emerging markets,' similar in kind to the disciplining of Japanese manufacturers a decade earlier.

5 Crowns of Gold and Green

State-building projects emerge through this continual confrontation with crisis. Simultaneously challenged by other capitalists in other locales, by the unruly power of the proletariat at home, and by the chaotic feedback that emerges from any market, local elites continually experiment with methods to negotiate their own intraclass conflicts and to better maintain the baseline conditions necessary for competition to proceed in the first place. Hell itself births kings to rein in and channel the flows of karmic commerce. As Paul Mattick argues:

> For Marx the state was an instrument of class rule, which included state functions that, although they did not directly pertain to securing the exist-

61 Brenner 2002, p. 163.
62 Glassman 2007, p. 187.

> ing social structure, were nonetheless dictated by the asocial character of capitalist production. It was part of the functions and tasks of the state to maintain the general conditions of production, which do not necessarily ensue from the competition among private capital entities, and to safeguard the interests of national capital in international competition.[63]

While crises are not strictly necessary at any given stage of the state-building process, they nonetheless pose systemic problems in particularly pronounced ways, all while providing the political context in which the intervention of an 'external' power becomes palatable to otherwise resistant private interests.

With regard to the first function of the state – that of negotiation – various forms of bourgeois enfranchisement take shape via distinct political parties or via interest groups within one-party systems or the deeper bureaucracies of multi-party states. As mediators, such institutions must act as if they are external to the 'civil society' of capitalists as a class. In the gilded adolescence of the state-building process, this performance must be maintained even though economic elites deploy political power rather directly and in the service of their own insular interests, with only the thinnest of lines separating the robber baron from the bureaucrat. However, in so acting – and insofar as accumulation proceeds apace – these institutions eventually come to actualise their mandate as an external force, allowing them to better approximate their role as representatives of the total social capital.[64] The functional constituency system in Hong Kong demonstrates the underlying logic in a particularly direct fashion, since the legislative body of the state is largely composed of literal industrial interest groups. In other words, the 'universal' character of the capitalist state does not necessarily or naturally require or even tend toward universal enfranchisement of the general population. The state is instead universal solely in its capacity to act as an embodiment of the total social capital that secures individual capitals against their tendency toward mutual destruction and serves to maintain the universal conditions in which accumulation can take place (including the class relationship), thereby guaranteeing social reproduction at large.

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63 Mattick 1978, p. 93.

64 Since these mechanisms are developed not simply out of logical necessity but instead through a concrete historical process, they will tend to vary in their details and include vestigial features from earlier forms of social organisation that have been exapted to serve capitalist imperatives (for example, the institutions of landed elites in Europe or the inherited infrastructures of the socialist states).

Though this latter function requires the formation of institutions that ensure general submission to the law of value and which therefore render the state as a universal representative of society in the abstract – such as a property system, which requires the existence of legal individuals able to enter into contracts – this does not carry with it any requirement that universality be actualised in the form of universal suffrage, the universal provision of social services, or even the universal extension of legal personhood to all individuals. Historically, none of these features were present in even the most prototypical liberal democracies until well after their own industrial ascent, if at all. In fact, suffrage and social services have only ever been offered in a stuttering fashion and almost always in response to the threat of insurrection. As Tronti reminds us, the development of the capitalist plan and ensuing socialisation of certain workforces in certain locales is always driven forward by the defeat of proletarian antagonism, much as a channelled spark ignites an engine. Thus, these features of the liberal state are not so much logical necessities of capitalist society as ancillary outcomes of a more foundational necessity: class struggle. Wherever class struggle is effectively stifled by historical circumstance, universal suffrage and other such niceties of liberal civilisation can be indefinitely postponed. Similarly, earlier gains of class conflict can just as easily be lost when a once-combative proletariat is effectively restrained and its long-fought victories stripped from it like skin slowly flayed under the tender care of the carnifex.

Hell is governed because the wheel of samsara is turned by souls. Value derives from the suffering of real workers. However grand, the palace of government is therefore ultimately an emanation of the class power forged in the productive sphere. This is evident in the simple fact that 'the state survives on surplus value, whether directly or indirectly appropriated,' which leads to the conclusion that 'the interests of the state, even in its condition of relative independence, are identical with the interests of capital.'[65] And, since value appears in the form of money, perhaps the state's core responsibility is managing the integrity of both local monies and the global monetary order. While seemingly technocratic, then, battles over the exchange rate impact the interclass conflict over the production of surplus value and express the intraclass competition over its appropriation. As a result, 'the international struggle of competition is also waged over monetary policy.'[66] On the one hand, this tends to aggravate instability, as is illustrated by the Japanese bubble and the Asian

65 Mattick 1978, p. 93.
66 Mattick 1978, p. 20.

Financial Crisis. On the other, 'the bourgeoisie is interested in easing competition, so that attempts are made continually to bring some order into monetary and credit relations through international agreements.'[67] And this bringing into order then evinces the inherently imperial character of production, because the international market requires both a financial and military undercarriage in order to operate, which can only be provided by the action of apex powers within the system.

Ultimately, then, the need for a hegemonic power arises when the same conditions that induce state-building projects on the local scale recur at the international one. At this point, the financial system becomes 'a key link in the reproduction of overall social capital' at the global scale, insofar as '[e]xposing individual capitals to international competition for financing of their activities makes it possible for there to be rapid reward of profitable, and punishment of insufficiently profitable, investments.'[68] And such a system can only exist in symbiosis with the state. Behind every lead firm lies an asset manager, behind every asset manager lies a central bank, behind every central bank lies a treasury, and behind every treasury, a navy and perhaps a nuclear arsenal. Crises arise in part as expressions of this process of international statecraft, triggered when monetary interventions induce market failures along weak links in the chain of global production, which then sets the stage for restructuring on more solid ground. The crises of the last several decades have therefore largely reinforced the commanding position of US firms within the hierarchy of global accumulation. But crises are also a double-edged sword, both reinforcing the existing hierarchy and threatening to destabilise it depending on what links are weakest. The question of which edge is sharper in any given moment is only answered after the cut is made and the blood begins to spill.

Nonetheless, all factions of capital must submit themselves to the greater authority of the state as the only power capable of securing the crucial substrates through which capitalist power operates: money, property, the basic infrastructures of the built environment, and the various police and military forces necessary to their maintenance. It is in this sense that 'finance can be also understood as a technology of power, which organises capitalist power relations.'[69] And this role is particularly salient in crisis. From at least the Bank Charter Act of 1844 – which gave the Bank of England exclusive power to issue banknotes – the machinery of macroeconomic management has evolved in

67 Ibid.

68 Sotiropoulos et al. 2018, p. 118, italics removed.

69 Sotiropoulos et al. 2018, p. 54.

response to repeated failures of the market alone to effectively subordinate the interests of particular fractions of capital to those of capital as a whole and to ensure the integrity of money, and, thereby, that of the market itself. Not only does the state act swiftly to quell any dissent following from market collapses, but it also steps in as lender of last resort, bailing out the firms deemed too big to fail and underwriting the stimulus measures needed to 'restore employment,' which also allows for the ascent of new lead firms. Similar duties persist in periods of stagnation and recovery. State institutions such as the treasury and central bank manage the background logistics of the monetary system, not only tweaking interest rates and adjusting the money supply but also tending to the literal mechanics of money production, whether in the printing of actual cash or in the maintenance of digital ledgers. While this seems to give inordinate power to a cabal of central bankers who appear to be pursuing their own factional interests in bailing out failed firms, such actions actually serve first and foremost to maintain the integrity and power of money itself.

More generally, fiscal stability allows the financial system to serve as a practical means for appraising 'actual concrete risks, making them commensurate with each other and reducing their heterogeneity to a singularity.'[70] And these risks are, fundamentally, political. Thus, the capital assets created and traded by financial institutions serve to 'monitor and control the terms and the reproduction trajectories of the contemporary capitalist relation, evaluating and endeavouring to predict (albeit imperfectly) the course of the class struggle, forestalling events that would be unfavourable from the viewpoint of capital.'[71] Both the institutional structure of the state and the imperatives of the market itself therefore compel the individuals administering these financial institutions to serve systemic interests rather than parochial ones. As critical theorist Werner Bonefeld argues, 'the form of the state, which attains generality in terms of the harmonies of formal equality and formal freedom as political domination, is hence posited as the political organiser of the "republic of the market" …'[72]

And it is in this role that the government is tasked with its various monetary duties: controlling inflation, managing the money supply, administering the interest rate. The apparent irrationality of the central banks' commitments therefore expresses neither the greed nor insularity of the bankers themselves but instead the irrationality inherent in the contradictory roles played by the

70 Sotiropoulos et al. 2018, p. 3.
71 Ibid.
72 Bonefeld 1991b, p. 116.

money form in capitalist society more broadly, expressed as an irresolvable conflict 'between the function of money as means of exchange, coordinating production and consumption, and the function of money as capital, subordinating the circulation of commodities to the reproduction of capital.'[73] In the same way that money itself is the purest representation of capitalist power in the abstract, so too does the maintenance of the monetary system demonstrate how 'the class character of the capitalist state is not a matter of the subordination of the state to the power of a particular class, but is inherent in the very form of capitalist state power' which ensures 'the dependence of the state on the reproduction of capitalist social relations.'[74]

Monetary policy also illustrates the fundamental contradiction between the duties of the state as guarantor of social reproduction in general and its specific role as mediator of intraclass conflict within particular locales. Ultimately, ensuring the ongoing production of surplus value at the planetary scale and overseeing the inherently local and private appropriation of this value are two different and often contradictory tasks. This contradiction then grows into a conflict between the state's role as representative of the total social capital and its role as the embodiment of distinct national blocs of capital riven with their own fraternal rivalries, visible in the distinction between the US as a hegemonic power governing the entire imperial system, the US as a parochial power defending the interests of its national firms within global competition, and the US state itself as a locus for power struggles between various factions of domestic capitalists seeking to tilt the scales in their favour. As Marx notes, although the hierarchical structure of global production ensures that these functions remain roughly in accord when accumulation is proceeding apace, they nonetheless exist in a continual tension that easily escalates to fraternal conflict when a crisis breaks out in any segment of the value chain. In these moments, the hegemonic power of the US is felt in full force, as the tweaking of domestic interest rates echoes through the global economy, subordinating up-and-coming blocs to the demands of multilateral institutions that ostensibly represent the interests of the 'international system' even while they are quite clearly controlled by the US, which itself may seem at any given moment to be under the sway of one particular cabal of business interests.

When we speak of the capitalist state in general, then, we are really speaking of two entities that are neither fully separate nor fully synonymous: a bordered

73 Clarke 1988, p. 115.
74 Clarke 1988, p. 130.

or hypo-state governing national markets (including both conflicts between and within the classes of the national territory), maintaining a national currency, and overseeing a national system of property rights secured by various forms of policing and patronage; and an imperial or hyper-state that oversees the planetary productive complex, manages the *de facto* global currency, and acts as the military backstop enforcing the ultimate rule of capitalist society itself. It is only in the first sense that we can speak of separate states that come into conflict with one another – and, even then, these clashes must be placed in the context of internal struggles between different factions of capitalists within these respective nations, who find themselves united only against a rebellious proletariat. In the second, we must instead recognise that each national government is a provincial power nested within the grand imperium of capital. The hyper-state of the imperial order is, in a sense, the sum of these many national governments acting together as a conflictual embodiment of the total social capital. But this is ultimately too simple. The imperial order proves to be both more than the sum of these parts and somehow also less: more in the sense that the singular state serving as hegemon within this order carries additional, universal responsibilities that far exceed those of its duties as a national government; and less in the sense that, because this position is held by a single state, these universal responsibilities are often intermixed with and reduced to its own national interests.

In this scheme, the hegemonic state is therefore a sovereign among sovereigns, tasked with duties that often conflict. Hell is governed by a court of ten kings but only one among them, Yanluo, is both ruler and judge. Simply speaking of imperialism as the political subordination of some countries by others therefore fails to capture the way that the imperial order interpenetrates all national territories, yoking subordinate factions of capitalists into a simultaneously cooperative and competitive hierarchy beneath the world's lead firms – which are of course safely ensconced behind protective tariffs, inequitable intellectual property laws, and the full force of the world's largest military. Similarly, flattening imperialism in this fashion disguises the degree to which even the leading nations in the imperial hierarchy are riven by their own conflicts within and between classes, how these conflicts reshape the national landscape of production, and how such transformations then induce changes in the subjectivity of the population at large.

For example, if one were to reduce the entire proletarian population of the US to nothing more than its role as a privileged 'labour aristocracy' of consumers relative to the rest of the world, the prospects for class struggle in the country immediately evaporate. At best, class politics can be replaced by the struggles of specific national groups suffering special forms of extra-

economic repression and prejudice, as in the liberal schema of identity politics – which serves to obscure the more fundamental material features of racialisation under the veneer of increasing racial equity within the cultural sphere. At worst, the reduction of imperialism to its geopolitical form of appearance entirely substitutes the struggle between nations (or even 'civilizations') for the struggle between classes, treating class conflict within the wealthy countries as an impossibility and, in the end, endorsing something similar to the classical Fascist equation of 'proletarian nations' pitted against the leading powers, thus justifying the 'petty imperialism' of late developers.[75]

Rather than a coherent polity, we find a fractious and divided power in which the law of value alone serves as the ultimate sovereign, much like the karmic currents that shape the basic structure of hell. The contradictory roles assumed by individual states within the larger imperial order is again most apparent at the level of monetary policy. While all national states with a sovereign currency have the ability to manage the availability of funds via the central bank and even gain from the selective printing of money – so long as it remains below the inflationary threshold – hegemony within the imperial system is ultimately defined by control over the global currency. Just as the British Empire once wielded its power in part through its control over the international gold system, so too does the US today exert its power through its control over the dollar. This dominance is visible at every level of international economic activity. In terms of foreign exchange, by 2022 'the USD was involved in nearly 90% of global FX transactions' and 'at least 85% of trading in the spot, forward and swap markets features the USD in one leg of the transactions.'[76] Meanwhile, 'approximately half of global trade is invoiced in USD' even though direct trade with the US accounts for only a tenth of the total. This is why dollars and US Treasury Bonds have long served as 'safe assets' for the holding of foreign exchange reserves. The financial centrality of the dollar and the political power of the American state ensure against volatility. Many countries therefore peg their own currencies to the dollar, and nearly 60 percent of global foreign exchange reserves were held in dollars in 2022 – though this is down from a peak of above 65 percent in the mid-2010s and more than 70 percent at the turn of the millennium.[77] As socialist thinker Tony Norfield argues, this then gives the US an 'exorbitant privilege'

75 The term 'proletarian nations' was popularised by the Italian Fascist Enrico Corradini to justify the nationalist project in Italy. The term 'petty imperialism' was coined by right-wing economist Takahashi Kamekichi to justify Japanese expansionism.

76 Maronoti, Bafundi December 2022 'Revisiting the international role of the US dollar', *BIS Quarterly Review*. https://www.bis.org/publ/qtrpdf/r_qt2212x.htm

77 Ibid.

within international finance, allowing it to 'fund its external deficits by borrowing at low cost in its own currency' and 'to earn an "excess return" on net foreign assets' without taking on any foreign currency risk.[78]

In this financial dimension, we can also appreciate the continuing importance of the UK despite its more general social decline. One outcome of the fall of the British Empire and ensuing collapse of British industry was the shift of British imperial power more fully into the financial sphere. Rather than outright decline, the loss of hegemony was accompanied by something more like a retirement into the easy comforts of delegated power, symbolised by the resilience of the City of London despite (in fact, because of) the otherwise eviscerating effects of deindustrialisation. While the gravity of the planetary productive complex has today decisively shifted to the Pacific, then, the international financial system remains a largely Atlantic affair. Norfield stresses that the UK is not, in this respect, a 'satellite' of the US, but instead argues that 'the relationship is better described as a "double planet" system: rather than the UK simply orbiting the US, each country's financial market exerts a significant "gravitational" pull on the other, even though the pull of the US is obviously larger.'[79]

The initial rise of the financial sector signals not weakness and decadence, then – as in the classic accounts of hegemonic transition offered by world-systems theorists like Arrighi – but instead marks the ascendance of a hegemonic power to govern the global monetary system, with banking capital growing in symbiosis with industrial interests. The financialisation of the US economy beginning in the 1970s was in fact accompanied by a redoubling of US power over global production, evident in the ascent of the dollar to its current position as the *de facto* global currency (after it was unpegged from gold in 1971), even though this control was only secured through the clearing-out of increasingly unprofitable US manufacturing firms. Though often portrayed as 'immaterial' and 'speculative,' finance and fiscal management of the money supply knit together the property system that undergirds capitalist society, thereby giving substance to production. In the broader sense, financial assets 'are in effect structural representations of capitalist relations, objectified perceptions which obscure the class nature of capitalist societies while, at the same time, signaling and calling forth the proper mode of behaviour required for the effective reproduction of capitalist power relations.'[80] Moreover, as production itself grows in organisational and geographic complexity, administering the money supply and managing the flow of finance through capital markets itself becomes a

78 Norfield 2016, p. 166.
79 Norfield 2016, p. 73.
80 Sotiropoulos et al. 2013, p. 2.

complicated logistical process that requires its own forms of monetary engineering. Finance is best understood as something like a specific technology for managing capital and general method of exercising class power. Financial capital is therefore not some final, false, or parasitic form of capital, the rise of which indicates the 'decadence' of the capitalist mode of production and its imminent collapse.[81] If anything, the steady growth of finance (including the boom and bust of asset bubbles) signals the vitality of the economy, not its decrepitude

Nor is this anything new. As Norfield notes, 'historians have described Britain in the nineteenth century as the "workshop of the world," but it was also, if not more so, the world's banker and commercial centre.'[82] In this capacity, the Bank of England served to underwrite the status of gold as the global currency via its management of the gold-sterling. The decline of the UK as the hegemonic power only became clear in the aftermath of two world wars: 'After 1945, and especially from the 1980s, given its weaker economic status, it evolved into becoming the worlds' broker – deriving revenues from financial transactions, rather than providing new sources of capital.'[83] But this decline in hegemony was driven less by Britain's long-established dominance within financial markets than by this gradual displacement within those very markets, until it was made to serve as a mere broker for global production. It was only in this context that deindustrialisation also came to represent gradually decreasing power over world industry and, thereby, the steady erosion of the country's territorial industrial complexes and a lopsided consolidation of the British economy around London. The Great Recession was the final blow, unveiling these deep inequities, undercutting what remained of a broader British economy, and resulting in a fifteen-year economic depression in which both wages and productivity have flatlined.[84] Thus does the reigning power, slowly hollowed of its military-industrial might, find out too late that the self-same process of financialisation has become a form of senescence, cultivating the rise of ascendant financial forces as the ailing imperium takes on the role of empress dowager within a new economic order.

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81 In fact, as Camatte correctly notes, the attempt to divide a true 'productive' economy from a false 'financial' one is an illusion that reaches its fullest form in the discourse of Fascism.

82 Norfield 2016, p. 213.

83 Ibid.

84 For an overview of the issue, see: Tooze, Adam 07 December 2023, 'Chartbook 252 How "Broken Britain" might reconverge: Notes from the Economy 2030 Inquiry', *Chartbook*. https://adamtooze.substack.com/p/chartbook-252-how-broken-britain

6 Beachhead

For a Hong Kong in the process of being freed of British rule, the crises in Japan, South Korea, and Southeast Asia had mostly served to reinforce the city's new role as a bridge between the mainland export engines and overseas capital markets. As the industrial complexes in places like the Pearl River Delta ascended to the centre of the planetary factory, dollars were funnelled into the mainland in the form of both FDI and export contracts. But much of this money first passed through Hong Kong: 'after 1997, most foreign loans owned by Chinese enterprises originated from the financial market in Hong Kong.'[85] Meanwhile, the city was also the major route through which the rising generation of mainland conglomerates began to establish direct lines into global capital markets. Uniquely able to negotiate between the mainland system and the legal intricacies of the global market, the city's finance and business services firms also played an integral role in both corporatising mainland SOEs and ensuring that the new generation of private mainland firms met global standards.[86]

The Hong Kong Stock Exchange (HKEX) therefore became the most common route for these new conglomerates to launch their Initial Public Offerings (IPOs), helping to make the city one of the world's largest IPO markets. Over the years, the exchange introduced an entire range of different options for mainland firms, including 'red chip' listings for mainland SOEs incorporated in Hong Kong or overseas, 'H-shares' for firms headquartered in the mainland (and already listed on the Shanghai or Shenzhen stock exchanges), and of course direct listings of private mainland firms like Tencent and Alibaba. In 1994, mainland companies composed a mere five percent of total market capitalisation on the HKEX. By the end of 2004, that number had risen to roughly 30 percent and, by 2022, it had more than doubled to 78 percent, with 29 of the top 50 companies on the exchange based on the mainland.[87] Throughout this process, the Hong Kong capitalists who had assumed leading positions within the city's economy by the time of the handover – such as Li Ka-shing, Lee Shau-kee, and Cheng Yu-tung – were gradually displaced by a new generation of elites with closer ties to the mainland.

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85 Hung 2022b, p. 57.

86 Haberly and Wójcik 2022, pp. 236–63.

87 Government of the Hong Kong Special Administrative Region, 2005, *First Quarter Economic Report 2005*, Financial Secretary's Office: Hong Kong. p. 69 https://www.hkeconomy.gov.hk/en/pdf/er_05q1.pdf; HKEX Consolidated Reports, February 2023 'HKEX Monthly Market Highlights', *HKEX*. https://www.hkex.com.hk/Market-Data/Statistics/Consolidated-Reports/HKEX-Monthly-Market-Highlights?sc_lang=en; Hung 2022b, pp. 60–4.

Just as in the case of the city's older British interests, this displacement was both symbiotic and competitive. The earlier generation of Hong Kong industrialists had made their fortunes, in part, through their links to trade and production networks across the border. These close ties then served as a channel for rising mainland capitalists to enter various markets within Hong Kong, where they rose to prominence at first alongside and then increasingly above the Hong Kong tycoons who had preceded them. This is especially noticeable within the financial sector itself, where both local finance firms such as AIA Group or Hang Seng Bank and the Hong Kong subsidiaries of major foreign firms like Goldman Sachs declined in importance relative to Chinese securities firms such as the China International Capital Corporation, ICBC International Capital, and Everbright, all of which came to play leading roles in the underwriting of IPOs on the HKEX. While foreign and homegrown Hong Kong firms dominated the sponsorship of IPOs throughout the 2000s, the 2010s saw mainland-headquartered firms grow in importance such that, by 2019, they had become the single largest group underwriting IPOs in the city. In addition, the 2010s saw an increasing number of new mainland securities firms registered in Hong Kong. Together, these two groups sponsored the vast majority of IPOs on the HKEX from roughly 2016 onward.[88] Similarly, the rapid growth of mainland capital markets also fed directly into the city. Stock Connect Schemes were established in 2014 and 2016 (and subsequently expanded in 2022), linking the Shanghai and Shenzhen stock markets to the HKEX, allowing mainland investors to purchase select Hong Kong-listed securities directly on domestic exchanges and vice versa.[89]

Within the real estate and construction sectors, the growing prominence of Chinese capital has been even more conspicuous:

> From 2011 to 2017, Chinese companies' share of successful bids for residential land auctioned by the Hong Kong government rose from 1 percent (measured in the total value of land sold) in 2011 to 100 percent at the peak of the first half of 2017. Chinese land developers pushed up the bidding price to more than 30 or even 40 percent of the asking price.[90]

88 Hung 2022b, pp. 79–80.

89 Interesse, Giulia 23 December 2022 'Mainland China and Hong Kong to Expand their Stock Connect Scheme', *China Briefing*. https://www.china-briefing.com/news/mainland-china-and-hong-kong-to-expand-their-stock-connect-scheme/

90 Hung 2022b, p. 81.

The same was true for commercial properties, as major mainland firms such as Evergrande and Everbright purchased and renamed two of the city's skyscrapers, Mass Mutual Tower (renamed China Evergrande Centre) and Dah Sing Financial Centre (renamed Everbright Centre), both located in the central business district of Hong Kong Island where Li Ka-shing had made his fortune. Prior to triggering a minor property price collapse due to its bad debts in 2020, Evergrande was China's largest private property developer and the most valuable real estate company in the world. Meanwhile, Everbright is ultimately owned by the China Investment Corporation, which is the mainland's largest sovereign wealth fund tasked with managing the country's vast foreign exchange reserves and reporting directly to the State Council – as of 2023, the firm had 1.2 trillion USD of assets under management, making it the second-largest sovereign wealth fund in the world (after the Norwegian government pension fund) and roughly a third as large as the asset management arm of JPMorgan Chase.[91]

As these cases illustrate, 'mainlanders' displacement of local tycoons in the property market invites comparison to local tycoons' replacement of British companies in the 1980s and 1990s,' such that, by the end of the decade, 'some of the most prominent buildings in Hong Kong's central business district [were] owned by Chinese companies.'[92] Throughout, the Hong Kong government has remained intricately involved in the ascent of mainland capital, especially within the real estate sector, where it acts as the owner and auctioneer of undeveloped land, with sales from such auctions serving as 'its most important source of revenue since the inception of colonial Hong Kong.'[93] In this capacity, the government's urban planning agencies also pursue large greenfield megaprojects such as the Northeast Territories New Development Areas near Shenzhen and the Lantau Tomorrow land reclamation plan on Lantau island, which invariably serve as outlets for collusion, speculation, and political controversy. Rapid-fire developments across the largely rural New Territories also serve as a symbol of Hong Kong's fusion with the Pearl River Delta megacity across the border, constructing a more-or-less contiguous urban fabric traversed by many locals on a daily basis.

Mirroring the trends in finance, mainland construction also firms came to dominate bids for Hong Kong's government infrastructure contracts over the course of the 2010s:

91 Megginson et al. 2023.
92 Hung 2022b, p. 82.
93 Hung 2022b, p. 81.

> Between 2008 and 2018, 35 percent of projects commissioned by the Highway Department went to mainland companies. For all ongoing projects as of 2018, 62.1 percent went to mainland companies (80 percent if we include a consortium involving mainland companies). For all completed and ongoing projects commissioned by the Civil Engineering and Development Department until 2018, close to 70 percent went to mainland companies.[94]

Locally, the corrupt dealings between the Hong Kong government and these mainland construction and real estate companies would serve as one of the major flashpoints for political unrest throughout the 2010s. Meanwhile, the city served as a launching-pad for many of these same mainland construction and engineering contractors to enter the international construction market, where they now play leading roles. Major overseas contractors like China Railway Group are listed through the HKEX while firms such the China International Fund, which specialises in infrastructure development in countries such as Angola and Guinea, have long been headquartered in the city.

The ascent of these new mainland elites within Hong Kong's economic order was naturally accompanied by the increasingly direct subordination of the city's government to the rising capitalist bureaucracy of the mainland. While this trend would culminate in a series of wide-ranging legislative reforms in the early 2020s, the political split between these two elite groups was already visible as early as the 2012 chief executive election. Since the chief executive is chosen by an election committee with a structure more or less mirroring that of the functional constituencies that compose the legislature – with corporate bodies acting as the primary electors – the office is always won by the favoured pro-establishment candidate, who is usually revealed far in advance of the actual selection. In 1997, 2002, and 2005, for example, former Chief Executives Tung Chee-hwa and Donald Tsang had been the sole nominees, winning 100 percent of the election committee's votes. In 2012, however, two different establishment candidates were pitted against one another: Henry Tang, the scion of a Hong Kong textile family whose father, the industrialist Tang Hsiang-chien, had fled the mainland after the revolution and subsequently played a key role in the handover; and Leung Chun-ying, a land surveyor and real estate executive with close ties to the mainland who had once served as real estate advisor to premiere Zhu Rongji while the latter was still mayor and party chief of Shanghai.

94 Hung 2022b, p. 82.

Beijing did not immediately indicate a preference for either candidate. Initially, 'local tycoons in the Election Committee mostly supported Tang,' including major figures like Li Ka-shing. In contrast, Leung won 'support from the representatives of Chinese state companies in Hong Kong,' thereby making the election into 'a competition between local tycoons and the mainland business elite.'[95] Once the central government sided with Leung, however, the election was essentially decided in his favour and he won with 66 percent of the vote. Under his leadership, the city government recruited mainland business elites into key consultation bodies and established entirely new mainland-dominated institutions such as the Financial Services Development Council, which was chaired by the head of the HKEX and 'included prominent Chinese princelings, such as the son of former premier Zhu Rongji, and heads of leading Chinese state companies, like Everbright and CITIC' on its board of directors.[96] The practice was continued in the subsequent administration of Carrie Lam (elected in 2017), who had served as Secretary for Development from 2007 through 2012, in which capacity she helped to formulate the city's Urban Renewal Strategy, widely viewed as a boon for real estate developers.

From the 1990s onward, inequality had already skyrocketed – ranking Hong Kong among the most unequal places in the developed world – real estate speculation had made housing wildly unaffordable for the average person and, by 2013, some 20 percent of the city's population were living in poverty according to (relatively narrow) official measures.[97] In response, young people had already begun to leave *en masse*, with emigration increasing at the fastest rate since the years before the handover. Under the Leung and Lam administrations, these problems not only grew more aggravated but also began to be popularly associated with mainland business interests, despite the fact that Hong Kong capitalists had long pursued the exact same policies. This was the context in which protests would start to increase in size and scale, taking aim at the influence of the mainland political system and associated elites. But, beneath the formal protests, there also stirred a deeper sense of hopelessness. By the early 2010s, the 'death of Hong Kong' had already become a recurring theme in the city's cultural discourse. Everyone seemed to understand, at some level, that they were swimming against a great historic tide pulsing out of the mainland, and, no matter how hard they pumped their aching limbs, they'd all be carried away in the end.

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95 Hung 2022b, p. 89.

96 Hung 2022b, p. 90.

97 Ngo, Jennifer, 2 November 2013 'New study says 1.47 million "poor and deprived" in Hong Kong', *South China Morning Post*. https://www.scmp.com/news/hong-kong/article/1345638/new-study-says-147-million-poor-and-deprived-hong-kong?page=all

7 Business as Usual

But mainland interests were far from monolithic. In the same way that the development of new blocs of capital in ascendant industrial territories was linked to the spillover effects of intraclass conflicts among factions of leading firms within the wealthiest countries, so too were these emergent factions riven by their own fraternal conflicts. Among the most important of these in the Chinese context are different degrees of access to the party apparatus and, thereby, to both overt state power and personal links with those who compose the political nucleus of the class. This divide is colloquially framed as a distinction between capitalists who lie 'inside the system' (内体) and those who lie 'outside the system' (外体). The distinction is not, however, identical to the conventional image of the Chinese economy as one bifurcated between a privileged minority of SOEs and a scorned private sector. After all, many of the large private group companies enjoy the same privileges as the corporatised SOEs and almost all the country's wealthiest private capitalists lie 'inside the system.' The vast majority are party members and the party-state itself operates in part through consultative mechanisms that, though more opaque, certainly seem to resemble the various systems designed by the British to selectively incorporate an ever-widening circle of local elites into governance without conceding universal suffrage for the population at large.

In general, those who remain 'outside the system' are smaller or up-and-coming capitalists who may have ties to local officials but have few connections to either the upper echelons of the bureaucracy or high-level executives and investors. There is nonetheless a substantial grey area stretched between the 'inside' and 'outside' of the system, insofar as many who may have ties to political elites nonetheless hedge their position through the purchase of overseas assets and, if they place bets on the wrong factions and fall too far out of favour, may even abscond to the wealthy countries, where they can live happily off the steady flow of dividends in some condo in London or Manhattan, penning polemics against the imminent collapse of the overbearing party dictatorship.[98] But most simply ensure that they have funds stashed in Singapore

98 Desmond Shum is a case in point. Involved in the private equity and real estate sectors in Beijing in the 2000s, Shum and his wife, billionaire Duan Weihong, had close financial and political ties to the family of former premiere Wen Jiabao. Shum himself served as a member of the municipal consultative conference in Beijing. Like many major capitalists of the era, he also purchased Hong Kong citizenship and began relocating his assets overseas. Then, after an expose targeting the Wen family empire exposed the web of corruption in Beijing, Shum and Duan divorced and Shum fled with their child overseas. He

and sufficient investments in places like Canada to obtain citizenship, just in case. Similarly, many will buy 'golden passports' for themselves and their children from smaller nations in regions like the Caribbean and Oceania, where the trade has become a major business.[99] Hong Kong has historically been an especially important avenue for this hedging of position and the recent laws passed to ensure greater political integration between the city and the mainland have been designed, in part, to exert regulatory control over this grey area in the capital market.

During the anti-corruption campaign of the latter-2010s, these activities only increased, stoking warnings of an imminent wave of capital flight that never came to pass. Nonetheless, even high-profile private capitalists who operate 'inside the system' can become the target of disciplinary campaigns, illustrating the inherent tension between individual factions of capitalists and between each firm's own interests and the interests of capital as a whole. This was clear in the burst of new regulations designed to rein in volatility, speculation and growing monopoly power in the tech sector in the early 2020s, during which major capitalists like Jack Ma – the fifth wealthiest person in China and longtime party member – were publicly subordinated to the more general interests of the national bloc of capital, with regulators intervening to cancel the much-anticipated IPO of Ma's Ant Group and initiating an antitrust investigation that then imposed divestment requirements on parent company Alibaba, similar in kind to the case pursued by the Clinton administration against Bill Gates and Microsoft in the 1990s. In this way, 'the system' itself comes to embody the interests of the national capitalist class as a whole through both explicit state regulation and the more opaque consultative and disciplinary mechanisms that exist both within the formal party infrastructure and within the informal interpersonal networks between elites.

Meanwhile, the privileges available to those 'inside' the system are perhaps most apparent in the case of the second-generation 'princeling' children

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then hired journalist John Pomfret to ghostwrite his memoir, in which he warns of the evils of the Chinese government and, in particular, his old political enemies. In 2023, he testified in Congressional hearings advocating for increased sanctions and tariffs. Meanwhile, his ex-wife Duan remained in China, where she was briefly the richest woman in the country. As part of an ongoing investigation into corruption, she was then detained in the late 2010s, leading to hyperbolic reports that she had been 'disappeared' by the state or even executed. However, by the early 2020s she had reappeared and resumed her public activities.

99 Law, Julienna 7 February 2024 'Trading up: China's elites seek second passports', *Jing Daily*. https://jingdaily.com/posts/chinese-millionaires-invest-in-second-passports-portugal-malta

of major state leaders. Many were able to play crucial roles in the ascent of Chinese firms within sectors like private equity due to both their domestic connections and their international experience as the first generation of elites with full access to overseas education and work experience. Zhu Yuanlai (or Levin Zhu), son of former premiere Zhu Rongji, is a representative case. Throughout much of the 1980s and early 1990s, Zhu lived and worked in the US, receiving a Master's in accounting from DePaul University in Chicago, a PhD in meteorology from the University of Wisconsin-Madison, and an MBA from the International Bankers' School run by the US arm of Credit Suisse. While in the US, Zhu also worked for international accounting firm Arthur Anderson in Chicago and Credit Suisse on Wall Street. In 1998, he was invited to join the executive team at the China International Capital Corporation (CICC), China's first international investment bank. The invitation itself was extended by Wang Qishan, a high-level bureaucrat and financial executive who had worked closely with Morgan Stanley and other international investment firms to found CICC in 1995 (while serving as governor of China Construction Bank).[100]

Zhu then served as CEO of CICC from 2004 through 2014, in which capacity he oversaw the divestment of Morgan Stanley's stake in the company – sold to several other US and Singaporean private equity firms – and the transfer of China Construction Bank's majority stake to China Central Huijin, a subsi-

100 Wang himself is a prototypical example of the direct overlap between the bourgeoisie and the bureaucracy that was especially prominent among the older generation of industrial leaders. After founding CICC, he coordinated with Goldman Sachs to lead the China Mobile IPO in 1997, which was among the first of the major corporatisations of SOEs. Meanwhile, Wang had been appointed Executive Vice Governor of Guangdong Province in that same year. When the Asian Financial Crisis broke out, Wang helped to manage Guangdong's response – no small matter, since Guangdong was by far the province most exposed to international capital flows at the time. Similarly, Wang is widely credit with helping Guangdong Party Secretary Li Changchun manage the build-up of non-performing loans in the province and served as a financial expert in Zhu Rongji's cabinet. With suggestions from Levin Zhu – who had witnessed the Savings and Loan crisis in the US firsthand – Wang helped to formulate the strategy of quarantining underperforming assets in special asset management companies (modelled on the US response), which then enabled the profitable portions of the old SOE sector to be corporatised. Wang also demonstrates the continuity of policy between the earlier period of liberalisation and the later period of state-building in the 2010s during the Xi administration. Wang himself was old friends (literally former roommates) with Xi Jinping. After several more lucrative bureaucratic appointments – as mayor of Beijing, member of the seventeenth Central Committee and Politburo, and a Vice Premiere of the State Council under Hu Jintao – Wang was then promoted to the Politburo Standing Committee in 2012, the same year that Xi rose to the position of General Secretary, and subsequently served as head of Xi's anti-corruption drive and then as Vice President from 2018 until his retirement in 2023.

diary of the China Investment Corporation, which is the country's sovereign wealth fund, reporting directly to the State Council. As mentioned above, Zhu was also among the mainland elites selected to participate in the new crop of advisory institutions in Hong Kong. Through his seat on the Financial Services Development Council, he helped to orchestrate further financial integration between the city and the mainland. Zhu's resume therefore offers a concise summary of the broader social role played by princeling capitalists in opening markets and bolstering the power of emerging mainland capital networks. Many more names could be added to the list, such as Wen Yunsong (Winston Wen), son of former premiere Wen Jiabao and founder of investment firm New Horizon Capital; Jeffrey Li, son of former Politburo standing committee member Li Ruihan and founder of private equity firm GL China Opportunities Fund; or Liu Lefei, son of former Politburo member Liu Yunshan and executive at CITIC's securities arm. All were certainly important to the general success of the developmental project. But focusing only on the role of these 'princeling' capitalists is ultimately disingenuous. After all, only a few of China's capitalists enjoy this level of access to the bureaucracy or to international capital markets, and most do not have close familial ties with top leaders.

China's modern capitalist class emerged from the technical and political elite that had formed through the ossification of the socialist developmental regime. However, the process was most pronounced within the lower and middle rungs of the bureaucracy, rather than at its commanding heights.[101] This first generation of capitalists was therefore rooted in county, city, and provincial governments, rather than the central state. In one common pattern, the city-level branches of old socialist-era industrial ministries – or county-level organs in the countryside – gave birth to the first capitalist firms when their managers spun off individual factories into profit-making ventures. This was, for example, the origin of Haier (today the largest white goods manufacturer in the world by sales volume), which began as an ailing refrigerator plant owned by the Qingdao city government before being restructured into a Township and Village Enterprise (TVE) by young assistant city-manager Zhang Ruimin in the 1980s. Zhang thereby became 'founder' of the new firm and its lead shareholder, alongside Qingdao's city industrial bureaus. In this capacity, he used cheap labour costs and the large domestic market to draw German manufacturer Liebherr into a joint venture, allowing the factory to both upgrade its plant and equipment and learn basic principles of corporate governance. The firm then expanded through lateral acquisitions of other appliance factories and

101 For an account of how these elite networks took shape, see: Andreas 2009.

began producing for the export market. By the end of the 1990s, it internationalised and, by the 2010s, Haier had become the world's largest manufacturer of many major appliances.[102] Meanwhile, by the early 2000s, Zhang had become one of the 100 richest individuals in China.[103]

Rapid economic growth also ensured a steady supply of more exceptional cases of upward mobility. For example, China's other major appliance manufacturer, Midea, was founded as a commune-level production unit for manufacturing glass bottles and plastic lids by He Xiangjian and 23 other villagers in Foshan, Guangdong in 1968, well before the legalisation of private enterprise or even the advent of the TVE system. Nonetheless, by the early 1980s, the enterprise was able to openly produce for profit, pivoting to manufacture electric fans, which soon became high-demand items in the sweltering SEZs of the sunbelt. In contrast to both the major princelings and the lesser officials-turned-capitalists like Zhang, He held no major posts and had minimal education, even refusing to speak in public because of his poor Mandarin. Nonetheless, as of April 2023, he was the sixty-fourth richest person in the world.[104] Similarly, Zhou Qunfei, the founder of major Apple supplier Lens Technology, was born to a poor family in Hunan, dropping out of school at age 16 to become a migrant worker in Shenzhen, where she used her savings to take part-time courses at Shenzhen University and then to start a small family company producing watch lenses. The company took off when it received a major contract from established domestic manufacturer TCL to supply mobile phone screens. This then became the firm's major line of business, securing contracts from Nokia, Samsung, and Apple. By the mid-2010s, Zhou had become China's richest woman and Lens Technology had become one of the country's largest contract manufacturers.[105]

These later generations of capitalists such as Zhou, born in 1970 and raised in the midst of China's transition to capitalism, also tended to be less dependent on explicit political patronage. But, as time passed and the postsecondary education system expanded, the rags-to-riches stories were tempered by more con-

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102 Pederson, Jay P. (Ed.) 2004 *International Directory of Company Histories*, Vol. 65, Farmington Hills, MI: St. James Press. Relevant section here: http://www.fundinguniverse.com/company-histories/haier-group-corporation-history/.

103 According to Forbes's 'China's 100 Richest.'

104 Bloomberg reporting 4 April 2023 'Bloomberg Billionaires Index: #64, He Xiangjian', *Bloomberg*. https://www.bloomberg.com/billionaires/profiles/xiangjian-he/?leadSource=uverify%20wall

105 Ren, Daniel 7 April 2015 'Zhou Qunfei: from lowly factory worker to China's richest woman', *South China Morning Post*. https://www.scmp.com/news/china/article/1758319/zhou-qunfei-lowly-factory-worker-chinas-richest-woman

ventional paths to wealth. The youngest generation of billionaires largely made their fortunes through some combination of inheritance, training at leading domestic universities such as Tsinghua, and the intersection of dumb luck and lucrative networking so often lauded as 'entrepreneurship' in the business press. Thus, China's current crop of software and ecommerce industrialists have origin stories similar to (though still slightly more salt-of-the-earth than) those of tech company founders in any other part of the world. Su Hua, the founder of Kuaishou, graduated from Tsinghua and worked as a software developer for Google and Baidu. Liu Qiangdong, founder of JD.com, graduated from Renmin University and taught himself to code, then entered business with loans from his family.[106] Zhang Yiming, founder of ByteDance, graduated from Nankai University, worked for Microsoft, and then secured venture capital funding to start his own company. Perhaps the most distinctive feature of this new generation has been their ability to receive high-end education within the Chinese university system. Similarly, though they may still have benefited from subsequent training in foreign multinationals, their startups didn't have to rely on joint ventures with foreign firms or the sale of majority stakes to international investment banks in exchange for the capital and corporate restructuring necessary to grow into a modern conglomerate. Instead, they were largely able to rely on domestic capital markets and other producer services infrastructure established and built out by their predecessors.

Given this context, it would be an error to assume that the authority of the Chinese state derives solely from its direct ties to leading capitalists or even that the subordination of individual capitalist interests operates primarily through explicit measures of state control, whether exacted by some consortium of leading families or through state shareholding structures in crucial downstream sectors of production. While the divide between those inside and outside the system remains salient, the authority of 'the system' itself is founded on a general confidence in its ability to ensure ongoing accumulation – especially when faced with compounding political, economic, and ecological crises – and to maintain the basic monetary and property infrastructures that enable accumulation to occur in the first place. In this regard, the bureaucracy has repeatedly demonstrated a high degree of competency despite low state capacity. Rather than rigid centralisation around dictatorial authority, statecraft in China has been defined by an extreme degree of flexibility and

106 In keeping with business standards elsewhere, Liu was also the subject of a high-profile rape case, which involved his arrest in the US city of Minneapolis and a subsequent civil suit that ended in a hefty settlement.

decentralisation, with growth and regulatory targets delegated to local officials who then receive performance-based promotions, simultaneously spurring economic development, providing a decentralised channel for the diffusion of strategic objectives, and bolstering the ranks of the central state with skilled and well-connected officials. The competitive decentralisation of lower-level governance also allowed for a nimble reconsolidation of the central state around core functions such as financial management, high-level industrial policy, the formulation of basic regulatory frameworks (for labour relations, public health, environmental protection, etc.), and of course national security and diplomatic activities. Even more importantly, the vitality of the Chinese capitalist class and the competence of the Chinese state in managing accumulation has also allowed the Chinese bureaucracy and leading territorial complexes in places like the Pearl River Delta to serve as the anchor for the emerging core of accumulation in East Asia at large – and, increasingly in Central, South, and Southeast Asia as well.

This remains a conflictual process, however, in which particularly speculative or powerful sectors are always targets for new regulatory drives, the bureaucracy itself must be rejuvenated through continual anti-corruption campaigns, and shifting international interests generate new geopolitical conflicts with neighbouring powers in contested zones such as the Himalayas and South China Sea. Meanwhile, just as each firm is caught in a multilateral battle to upgrade its technical capacities to secure greater shares of the flow of value against both upstream lead firms and midstream challengers, so too is the bureaucracy forced to build out state capacity in the course of its own struggles against both new generations of increasingly ambitious capitalists at home and in emerging centres such as India, and external threats from the established powers. Though arguably in decline, the firms headquartered in the wealthy countries nonetheless remain at the apex of the economic food chain and there is nothing predetermined about their fate. Nonetheless the governments that serve the interests of these leading elites now find themselves burdened by metastasised militaries and dangerously devolved decision-making structures that enable pet politicians drunk on their own moral righteousness to grow increasingly imperious even as their own social base fissures, with power shifting suddenly and violently between mad kings and senile viziers.

Few can look at America today, in the midst of the second Trump administration, and see anything but an increasingly brazen oligarchy with little to no interest in sustaining the livelihoods of common people. Nonetheless, for a while, the hegemonic power is always still able to mobilise its political heft and exorbitant privilege within the financial system (not to mention the not-so-veiled-threat of its world-spanning military) to reassert and restructure the

productive hierarchy in its favour, constraining potential challengers at crucial points in their ascent – or even annihilating them entirely. But eventually the crown grows heavy. America turns against America, as Wang Huning would say. The ordering force of hegemony thus becomes a source of system-wide volatility, alternating between violent military outbursts and sudden bouts of isolationism that threaten to destabilise the foundations of the world market. Madness afflicts the minds of the masses and the court of the ten kings fissures slow and sharp like spring ice breaking over the serene darkness. Somewhere below, a new emperor stirs. Or perhaps the throne is empty, and there is now nothing but a gaping pit into which the hell money drops soft and quiet as ash.

CHAPTER 7

Under the Neon Sun

As the hell money burned in the streets, I made my way to a local leftist bookshop in Mong Kok, where I was giving a talk to a small crowd of activists and scholars about the Occupy movement in the US and the theory – at the time just becoming fashionable in anglophone communist circles – that global class struggle had entered into a new 'age of riots' in the wake of the Arab Spring. Communist philosopher Alain Badiou had even deemed this the 'rebirth of history,' arguing that, in many ways, the era resembles 'the first working-class insurrections of the nineteenth century.'[1] As described by the communist collective Endnotes, the tactics involved in these struggled included:

> (1) mass riots, capable of widespread diffusion, but often focusing on a territory; (2) the transformation of that territory into an occupation, a centre of debate and display (and confrontation with the police); and (3) attempts to extend from that centre out into the surrounding areas, by means of wild demonstrations, neighbourhood assemblies, solidarity strikes, and blockades.[2]

Three major class fractions could be identified to have played central roles: 'graduates with no future, the youth underclass, and organised workers.'[3] Meanwhile, Badiou maintains that the sudden increase in the cadence and extent of popular struggles in the early 2010s signalled only the first stirrings of such an era, 'as yet blind, naïve, scattered and lacking a powerful concept or durable organization.'[4] These descriptors also became somewhat self-referential, as both Badiou's work and that of Endnotes would subsequently become important points of reference for those who had participated in such struggles, experienced their collapse, and sought to inquire into their limits.

The issue was especially topical in Hong Kong in the summer of 2014, given that several major leaders in the city's pan-democratic movement had been calling for an occupation of Central (the major business district and the location of the Central Government Complex where the LegCo convenes) seem-

1 Badiou 2012, p. 5.
2 Endnotes 2013a, pp. 32–3.
3 Ibid.
4 Badiou 2012, p. 5.

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ingly modelled on those that had recently spread across Europe and North America. Crammed together in a small space made over-intimate by the spiking price of square footage, I detailed for the audience the conflictual course of the Movement of the Squares in Europe and the different Occupy currents centred on different cities in the US, tracing out the polarity that arose between the more traditional activist approach of Occupy Wall Street in New York, initiated by established figures in the anti-globalisation movement, and the more antagonistic path taken by Occupy Oakland in California, where a newer generation of radicals and militant youth took the lead, often clashing with the established activist crowd. In popular accounts, this tension would often be cast in terms familiar to the established activists who controlled much of the branding: as a tactical struggle between 'violence' and 'non-violence,' or as a conscious political decision in which 'leaderlessness' was chosen in place of 'organization.' But these terms failed to capture the real complexity of the occupations, which had very quickly spilled beyond their bounds with an inchoate power drawn from the very inability of those gathered to formulate any adequately representative program or demands.

Though this inability expressed a concrete limit within each struggle, it was also what allowed these otherwise constrained moments to serve as a political 'event' in the sense used by Badiou: as a sort of social singularity that, through its own self-reflexive negativity and non-communication with the given terms of the political order, was able to exceed that order. Though inherently ephemeral, this rupture with the status quo can then trigger a sort of phase shift within politics more generally – a 'truth process,' in Badiou's terms – producing political novelties and thereby making previously 'impossible' tactics into conventional practices and obscure philosophies into widely acknowledged points of reference. As described by Michael Neocosmos, the 'event names the void, the absence, what is considered simply impossible, that which is not conceivable from within the knowledges of the situation … something that is both located within the extant and that points to alternatives to what exists, to the possibility of something different.'[5] Political events therefore always exist in tension with the 'situation' from which they emerge. On the one hand, they are obviously produced by this social context. On the other,

> An emancipatory political subjectivity or consciousness can only exist 'in excess' of social relations and of the social division of labour … Such a politics cannot therefore be understood as a 'reflection' or 'expression'

5 Neocosmos 2016, p. 56.

> of existing social groupings, their division and hierarchies. Without this 'excessive' character which 'interrupts' the reproduction of the regular, the habitual, politics can only be sought within the social itself and ends up being simply conflated with 'the political', with the state and its 'political society'.[6]

Though their inability to cohere ensures that many of these uprisings will remain merely 'nihilistic spurts' or 'immediate riots,' in Badiou's terms, this same chaotic indeterminacy is also what makes it possible for new unifying ideas to emerge and gain a consistency between these events.[7] Though first visible in the simple mimesis of tactics, aesthetics, and tone, this consistency can (under partisan influence) eventually evolve toward something resembling revolutionary organisation.

The formless and nihilistic energy already visible in relatively minor events such as Occupy, I argued, was a sign of things to come. I introduced the small crowd to an equally small group of communist and anarchist thinkers attempting to articulate the changing cadence of global class struggle, pointing out the similarities between the occupation of central Bangkok in 2010, the insurrections of the Arab Spring, recent riots in Athens and London, and even the confluence of strikes and riots just across the border in the Pearl River Delta, where I'd just recently been living while conducting research. Over the previous months, I'd had the chance to make several visits to Hong Kong, where I'd observed some of the protests that had been building up throughout the summer, listened to different factions debate out the details of local politics, and found myself in conversation with a wide range of local activists – some of whom had set up this talk. But when I suggested that Hong Kong itself might soon follow a similar path to that seen elsewhere, I was met with polite disbelief. Politeness itself was, in fact, a sort of theme. One activist pointed that Hong Kong people were simply 'too polite to riot,' a common line that I'd heard multiple times over the course of the summer. One of the scholars added that this attitude was itself a form of colonial servility rooted in the cultural campaigns of late British rule. Another audience member gestured toward pan-democratic figures such as Benny Tai and Chan Kin-man, who had branded the campaign to occupy Central as an effort to 'Occupy Central with Peace and Love,' demanding strict non-violence from participants. Even the anarchists were unconvinced. After all, the city had rarely seen so much as a single window smashed.

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6 Neocosmos 2016, p. 13.

7 Badiou 2012, p. 92.

1 Rawls in Hong Kong

Ever since 1967, even the largest of Hong Kong's protests had been extremely passive.[8] Because of this, the city was often upheld as a global model for 'civil society' organising, enjoying an extraordinarily high concentration of NGOs, student groups, progressive politicians with a large base of popular support but little hope of taking power, unions barely strong enough to strike, and any number of assorted social movement institutions clinging to some distant aura of their 'grassroots' past. Rather than Milton Friedman's vision of the city as a neoliberal paradise, then, Hong Kong was instead something closer to the Rawlsian heaven of social justice: interest groups asserting their respective rights in the field of public discourse, patiently and persistently pursuing institutional reforms, speaking truth to power but not obstructing it, and never, ever challenging the basic rule of private property. Though its own self-image is constructed in contrast to the formal mechanisms of government, it is important to remember that civil society lies entirely within the realm of 'the state,' in the broader sense of the term. After all, most civil society organisations are ultimately financed by government subsidies or even by direct payments from the ruling class, operating as the 'philanthropic' arm of bourgeois power. Civil society is therefore simply the name for the informal operation of the state (i.e., the deployment of class power) across the border that supposedly separates state from 'society' – demonstrating, of course, that this divide is itself an alienated appearance generated by the very practice of class rule.

The notion that civil society serves as the engine of social change was itself an artifact of the defeat of the communist movement in the twentieth century and its subsequent dismantling. As Badiou explains:

> Under the interchangeable rubrics of 'modernization', 'reform', 'democracy', 'the West', 'the international community', 'human rights', 'secularism', 'globalization' and various others, we find nothing but an historical attempt at an unprecedented regression, intent upon creating a situation in which the development of globalised capitalism, and the action of its political servants, conforms to the norms of their birth: a dyed-in-the-wool liberalism of mid-nineteenth-century vintage, the unlimited

8 One important exception was the 2005 anti-WTO demonstrations, which saw a series of more aggressive performance tactics and outright clashes with police. These efforts were, however, almost entirely led by the militant Korean delegation.

> power of a financial and imperial oligarchy, and a window-dressing of parliamentary government composed (as Marx put it) of 'Capital's executives'.[9]

The civil society paradigm therefore expresses what Badiou and Neocosmos call 'state politics' which 'concern the representation of interests (by parties, interest groups, social movements, NGOs, etc.) and the management of such interests, thus restricting them to controllable limits.' We can even understand the state, very broadly defined, as 'a machine for creating identities, as these are simply the subjective representations of interests.'[10] In Badiou's terminology, the state therefore always operates through some array of 'identitarian objects.'[11]

Within the fundamentally regressive mechanism of civil society, then, questions of structural power are essentially off-limits, with the very idea of the 'structural' dissolved into empirical issues of privilege and prejudice, all designed to measure degrees of inter-group inequity. This also means that questions of building power, taking power, or smashing the rule of those already in power were, in every practical sense, forbidden. Even among the most radical factions within the Hong Kong political scene, concrete political activity was focused almost exclusively on awareness-raising, consensus-building, policy advocacy, hosting vigils, and arranging a never-ending parade of non-violent, non-aggressive demonstrations in the vague hope that walking in these endless circles would somehow prove enlightening for society as a whole. In other words, politics proper – as the name for the force of human struggle in its historical unfolding – had been effectively euthanised.

Within the civil society paradigm, any incendiary political potential is smothered under a flurry of pseudo-political performances. In Hong Kong, by far the largest and most influential of these performers were the pan-democrats, a broad grouping of politicians, academics, and non-profit organisers advocating for increased democratisation. The oldest generation of pan-democrats could trace their roots to the new social movements that arose among students, professionals, and other middle strata groups during the 1970s. Over the course of the decade, this emergent 'social-action faction' was increasingly vocal in distancing itself from the 'Maoist faction' that looked toward the Cultural Revolution on the mainland and sought to continue the insurrectionary project begun in 1967. While both camps were mostly 'made up

9 Badiou 2012, p. 5.
10 Neocosmos 2016, p. 19.
11 Badiou 2012, p. 93.

of university students and graduates' and distinguished themselves from the mainland-affiliated old guard that had dominated leftist politics for decades, they also settled on separate ends of the emerging political spectrum.

As its name might suggest, the Maoist faction was primarily influenced by the new 'Maoist' politics developing in the circles of the new left, with many of their central figures having been involved in politics while studying overseas in places such as the US. In contrast, the social-action faction 'was influenced by a wide range of political ideologies, including liberalism, anarchism, western Marxism and Trotskyism,' and tended to be unified less by their specific standpoint than by their shared focus on local social justice issues and ideological opposition to the Maoists.[12] With the end of the Cultural Revolution on the mainland, however, the Maoist faction splintered. Many members were gradually absorbed back into the official mainland-affiliated organisations of what was once the old left. Others converted to Trotskyism and essentially dissolved into the growing social movements. Meanwhile, the social movements they led grew increasingly comfortable operating in the interstices, addressing local issues left out of the colonial government's new social programs and attempting to shape the overall course of reforms, rather than trying to overthrow colonial authority as such.

From the late 1970s onward, the democratic currents within the social-action faction also expanded, drawing influence from the rising liberal and social-democratic milieus emerging at the time on the mainland. Novel forms of political participation also began to open to local activists as the British extended new governance mechanisms and cultural programs to native Hong Kongers. As the handover loomed, the colonial government rolled out increasingly rapid democratic concessions that expanded the scale and scope of the legislature and allotted more and more seats through direct elections. Ultimately, the strategy had more to do with geopolitical manoeuvring in the course of the handover negotiations than with any legitimate commitment to democratic principles. It was not coincidental, for instance, that the colonial government failed to implement universal suffrage even while its scheduled expansions of direct elections implied a certain timetable for universal suffrage to be met under Chinese sovereignty. Over the same years, it in fact 'promoted the corporatization and independence of government departments,' effectively insulating them from democratic influence.[13] Nonetheless, the colonial charade of democratisation helped to stoke the hopes of the budding pan-democrats. Activists

12 Yang et al. 2022. p. 17.

13 Jiang 2017, p. 163.

began to run for seats in the newly opened district boards, in neighbourhoods, and on the urban council, positioning themselves 'as representing the expanding "new middle class" constituted by professionals and managers in both the private and the public sectors, including teachers, social workers, and others.'[14]

Initially, this would lead to the formation of a Democratic Reunionist campaign, with the social-action veterans who served on the Basic Law Drafting Committee (tasked with determining the legal form to be taken by Chinese sovereignty) seeking to 'reform the colony into a social-democratic city-state' capable of modelling democratisation for the mainland. The rise of the Tiananmen protests in 1989 would see these hopes dashed, however, with Hong Kong democrats organising 'large-scale rallies supporting the students and rais[ing] an astronomical amount of donations' and then coordinating 'a rescue mission to smuggle persecuted dissidents out of China.'[15] In response to the crackdown, they then called for a 'three strikes' movement – 'a labour strike, school strike, and market strike' – designed to shut down the city, but their strict commitment to non-confrontational tactics undermined the effort. When a small riot broke out on the eve of the strike campaign, they decided to call the entire thing off 'for fear of causing unrest and alienating their middle-class base,' with many spreading rumours that the riot had been instigated by outside agitators from the mainland.[16] Because of their support for the student protestors in Beijing, however, even the more ardent of the Reunionist Democrats fell from the good graces of the central government. The mainland instead shifted its base to the city's business elite, who had wasted no time in endorsing the crackdown and even 'formed the first foreign delegation to greet Chinese leaders in the summer of 1989,' helping reestablish the country's legitimacy within international business circles.[17]

It was in the wake of 1989 that the modern pan-democratic current would begin to take shape, spanning both the more mainstream democrats and a much smaller, 'more radical wing consisting of student organizations … and several fringe groups' including leftover Trotskyists.[18] An electoral alliance of liberal parties swept the city's first direct elections in 1991 but, given the structure of the LegCo and the fact that the city was still under the rule of a British-appointed Governor, even the most resounding electoral victory could not lead to a meaningful majority. Political activity therefore shifted into the civic

14 Hung 2022b, p. 155.
15 Hung 2022b, pp. 128–9.
16 Hung 2022b, p. 158.
17 Hung 2022b, pp. 128–9.
18 Hung 2022b, p. 157.

sphere. The annual 4 June commemorative vigil became a living symbol of the movement, with the entire liberal current coming together to hold a candlelight memorial in Victoria Park, after which the 'radicals' would split off to conduct a non-violent march to some symbolic target. Despite their differences, however, both factions were imprinted with the peculiar and pompous politics of the era, fully embracing the drunken liberalism of the 'End of History' and imagining that the collapse of the USSR would be followed shortly after by a similar political crisis in China. Much of their strategy hinged on the notion of either such a crisis leading to a general political collapse across the border, or on the emergence of some new mass democratic movement on the mainland. Meanwhile, as globalisation accelerated and the handover loomed, their political allegiance shifted firmly toward the US and international institutions such as the UN, both of which funnelled money into aspiring liberal organisations in the city.

This was therefore the period in which many Hong Kong NGOs would become increasingly intertwined with both the global aid and philanthropy complex and the post-Cold War 'diplomatic' arm of the US security state – epitomised by institutions such as the National Endowment for Democracy and US Agency for Global Media (funder of Voice of America and Radio Free Asia) – which took over an increasing portion of the 'soft power' activities once subsidised directly by the CIA. Nor were these relationships opaque affairs that have only become clear many years after the fact. The money was easily traceable, and, in 1991, NED president Allen Weinstein openly stated that 'a lot of what we do today was done covertly 25 years ago by the CIA.'[19] Then as now, many liberal activists in Hong Kong had few qualms about courting the support of even the most conservative politicians in the US and Europe. Thus, the emergence of Hong Kong as the global capital of civil society organising was itself a product of the peculiar period of Pax Americana that began roughly when the Cold War ended. The Japanese crisis had eliminated US firms' major economic competitors, the collapse of the USSR had liquidated the empire's long-time political rival, and the opening of the Chinese mainland had seen the global market extended to one of the world's last and largest untapped labour pools. Worldwide, marketisation was accompanied by the collapse or mummification of remaining socialist parties, with many former leftists defecting to the liberal coalitions arising in their wake.

19 Quoted in ProPublica, 24 November 2010 'The National Endowment for Democracy Responds to Our Burma Nuclear Story – And Our Response', *ProPublica*. https://www.propublica.org/article/the-national-endowment-for-democracy-responds-to-our-burma-nuclear-story

While the pan-democrats had enjoyed success in the final elections of the colonial era, building up their base throughout the 1990s, it was not until after the handover, followed soon after by the Asian Financial Crisis and the SARS epidemic, that the camp came into its own, helping to orchestrate a series of large-scale demonstrations between 2003 and 2007 that catapulted many of the movement's leaders to the centre of both mainstream institutional politics and the various social movements that served as its radical counterpart.[20] From this position, the pan-democrats were able to construct an expansive institutional edifice that proved capable of coopting new grassroots movements and diverting potentially volatile political conflicts into established institutional channels. Over subsequent years, the exact structure of the pan-democratic camp splintered and recomposed itself, incorporating younger organisers into its activist wing – especially through student organisations (such as Scholarism) and the Hong Kong Federation of Students, elected by the student unions of the city's major universities – who helped to both lead new waves of protest and carry on liberal traditions of civility, non-violence, and pandering to political patrons in the West. But, throughout this period, the actual political program of the pan-democrats remained indistinct. The demand for universal suffrage has been able to align many different political factions over the years precisely because the absence of universal suffrage has prevented them from holding any power through which to implement their programs. The demand therefore evolved into a sort of empty signifier, with every faction imagining that, once obtained, suffrage would simply allow 'the people' to decide their own fate. Thus, though loosely allied by their liberal politics, the deeper unity of the camp was visible in their practical commitment to reformist and generally 'civil' methods, which remained the unquestioned foundation of political activity in the city until that summer in 2014.

2 With Peace and Love

In a certain sense, glimmers of a different politics had begun to emerge as early as 2011, when a small group of young protestors inspired by the Occupy movement set up their own encampment at the base of the HSBC building in the central business district, defying orders to leave. Lasting a full 10 months without suffering a single eviction, the original Occupy Central ultimately proved to be one of the longest-lived protest encampments of the early 2010s.

20 Chan et al. 2007.

Nonetheless, the encampment was extremely small (at its height involving only a few hundred people) and, by the time of its eviction, was able to draw on little public support to prevent the forcible removal of the handful that remained. But the small occupation proved to be a strange sort of political nexus, hinting at new sentiments fermenting among the city's youth. In retrospect, the event even seems to have disjointed time itself, as if a fragment of the autumn of 2014 had somehow been severed from the sequence of history and eddied back to swirl ominously in the basement of HSBC.

Another glimmer emerged in 2013, when an independent group of crane operators initiated a wildcat strike at the Port of Hong Kong. The largest and longest-running labour action in years, the strike garnered international attention and drew in widespread support from activists. In a sense, it compressed the entire range of social conflicts in the city down into a single confrontation: the rising cost of living ensured that workers' take-home pay was effectively lower in 2013 than it had been a decade earlier; the massive surge of exports pouring out of the mainland accelerated the pace of work and put more pressure on operators, who were given breaks of only a few minutes; work itself was managed according to increasingly baroque subcontracting systems that enabled frequent violations of labour standards; and, maybe most importantly, the action was initiated at terminals operated by Hongkong International Terminals (HIT), a subsidiary of Li Ka-shing's Hutchinson Whampoa, the very symbol of the finance, logistics, and real estate interests that had shaped the city into its increasingly unliveable form.

But the strike also signalled the enduring strength of the civil society apparatus. Though begun as a wildcat action, it was quickly endorsed by the Union of Hong Kong Dockers, which led negotiations despite only a small minority of workers being members of the union – itself affiliated with the Hong Kong Confederation of Trade Unions (HKCTU) and the Labour Party, both led by the old guard of the pan-democrats. While the HKCTU was able to position itself as the progressive alternative to the state-backed and company-aligned Federation of Trade Unions, its commitment to established social movement standards was nonetheless a major factor in smothering the strike's incendiary potential. The result was predicable: 'With union representatives spearheading negotiations, the initial energies of the striking workers were quickly diverted and the strike was prevented from spreading to a majority of the workforce.'[21] The basic pattern was visible in the HKCTU's refusal to push back against suppressive measures deployed against the strikers, which often found itself in conflict

21 Ultra 2014.

with the strikers' own attempts to spread the stoppage to more workers and deepen its impact on port operations. For example, only days after the initial group of workers had walked off the job, HIT took the case to the local government and won an injunction banning strikers, unionists, and supporters from entering any of the terminals. Rather than pushing through regardless of the legal threat, the union acquiesced to the ban and instead set up tents on the sidewalk outside, holding signs and manning an entirely symbolic blockade through which scabs were allowed to pass without issue, with the result that 'behind the show, the port was running only slightly slower than usual … still operating at 80% capacity even at the height of the shutdown.'[22]

Throughout, workers and supporters who advocated for more aggressive actions were sidelined by union leadership. Eventually, the union determined that 'even the minor disruption caused by the roadside occupation was too much for the palate of civil society (who were, after all, the main contributors to the strike fund)' and therefore 'dismantled the camp altogether, setting up a second, much more meagre encampment' in front of the headquarters of Hutchinson Whampoa in the central business district.[23] In the end, the strikers won only a partial raise and most of their demands remained unmet. Ironically, older workers pointed out that two strikes that had occurred prior to the 1997 handover 'when the Labour Party was non-existent and most labour unions were illegal' had actually been more successful, 'since the workers had no union or party representation pushing them to appeal first and foremost to the tastes of civil society.'[24] Instead, they had been forced to conduct wildcats that used direct economic obstruction as their main tactic, winning far more substantial victories than the strike in 2013. Ultimately, then, there is maybe no better symbol for the particular form of soft repression that civil society and its 'state politics' specialises in: angry workers take aim at the beating heart of the city's economy only to have their actual strike smothered by civil 'supporters' negotiating on their behalf; the shutdown slowly sculpted into the shape of a social movement; the strikers themselves reduced to nothing more than protestors waving signs and shouting slogans; and the site of the struggle shifted away from the port entirely, to be strangled to death on the sidewalk under the skyscrapers of the central business district.

These were the basic conditions that defined politics in Hong Kong until the summer of 2014, when the glimmers of something else became visible in the

22 Ibid.
23 Ibid.
24 Ibid.

sudden spark of new social conflicts. In retrospect, that talk in the leftist bookstore would accidentally prove prophetic. First, that very week would mark a major turning point in the cadence of the very class conflicts that were the focus of the talk, with protests against a police shooting in faraway Ferguson, Missouri, initiating a sequence of riotous rebellions against police violence over the subsequent years – Baltimore in 2015, St. Paul, Baton Rouge, Milwaukee, and Charlotte in 2016, Anaheim in 2017, Memphis in 2019 – that would eventually peak in the George Floyd Uprising in 2020, which saw the downtown cores of nearly every major American city (and many minor ones) burned and looted.[25] Second, and even more unexpected, was that the end of the summer of 2014 would see a similar sequence initiated in Hong Kong itself, as an accelerating series of protests culminated in the 'Umbrella Movement,' which effectively shut down large portions of the central city from September until December of that year. As in Ferguson, however, the Umbrella Movement foreboded more to come, prefiguring the citywide uprising of 2019.

The first signal had already arrived a couple months earlier, in June of 2014, when a small but aggressive group of villagers and activists demonstrating against a land development plan breached security cordons around the Legislative Council building, tearing down barricades and scuffling with security guards.[26] Ever since the early expansion of public housing by the colonial administration, residential developments had tended to be concentrated in 'New Towns' located in greenfield sites on less developed islands and out along the further reaches of the mostly rural New Territories near the border with the mainland. Across that border, the glittering cityscape of Shenzhen offers a stark contrast to the green hills of Hong Kong's forested fringe. Since economic activity between the two cities was only predicted to increase, real estate in the New Territories has become more and more attractive, with developers pressuring the city government to allot land near the border for future housing projects. The northeast New Territories development being opposed by the protestors

25 In total, protests occurred in 40 percent of all US counties over the course of the summer, and the uprising is estimated to have seen anywhere from 15 to 26 million people participate. Many protests in major cities, especially over the first weekend, also saw the near-complete abandonment of older mores dividing 'violent' from 'non-violent' actions, with property destruction and looting widely practiced and even more widely accepted. (Buchanan, Larry, Quoctrung Bui, and Jugal K. Patel 3 July 2020 'Black Lives Matter May Be the Largest Movement in History', *New York Times*. https://www.nytimes.com/interactive/2020/07/03/us/george-floyd-protests-crowd-size.html)

26 Chong, Tanna and Cheung, Gary 7 June 2014 'Protesters storm Legco over northeastern New Territories plan', *South China Morning Post*. https://www.scmp.com/news/hong-kong/article/1526945/protesters-storm-legco-over-northeastern-new-territories-plan

was one such case, with many seeing urbanisation in the area as a symbol of integration with the mainland, as if the industrial sprawl of Shenzhen were swelling up to spill across the border.

The June demonstration both prefigured a series of later political campaigns in the New Territories and presaged subsequent attempts to storm the LegCo in the years to come. But it nonetheless remained trapped within its moment, divided between the old politics of civility and a new militancy just beginning to take shape. On the one hand, the protest lay well within the scope of normal civil society organising. It was a local issue campaign serving villagers set to be displaced, with the support of a variety of social justice and environmental NGOs. On the other, the issue began to bring to the fore both more militant tactics and more extreme expressions of anti-mainland sentiment, with the latter signalling the ideological ascent of a distinctly right-wing localism that would soon prove particularly popular among poorer Hong Kongers confined to this suburban fringe. Over the course of that summer, both the June demonstration itself and the general themes it evoked had become regular talking points, helping build momentum toward the end of September, a mere month after that talk at the bookstore, when thousands responded to an ongoing student protest shortly before the pan-democrats' original deadline to Occupy Central, spilling into the heart of the metropolis in a massive wave of non-stop demonstrations and seizures of public space that continued into December. Though these protests were still somewhat civil, the strict non-violence of 'peace and love' proved somewhat negotiable.

The Umbrella Movement, as it came to be known, would be the largest and most sustained series of protests since the 1967 riots. More importantly, it served as

> the first arena in which a younger generation of urban radicals began to confront the city's established liberal opposition and won, breaking through customary presumptions about the necessity of non-violence, the need to limit the scope of demands for the sake of pragmatism and popular support, and the more general constraints imposed by the concept of civility.[27]

For at least a decade, young Hong Kongers had watched the pan-democratic strategy flail, sacrificing social struggles on the altar of pragmatic respectability. Now, this strategy began to be rejected by youth across the political spec-

27 Ultra 2014.

trum, ranging from the new generation of liberal leaders such as Scholarism's Joshua Wong, to new right-wing localists openly advocating for secession, to smaller grouplets of militant leftists who had watched popular upheavals take hold across the world and wondered if, just maybe, Hong Kong might be next. More importantly, larger and larger masses of otherwise apolitical young Hong Kongers also began to be drawn to the field of political action out of a general nihilism, expressed most often as a sense that they had no future in the city and that Hong Kong itself was dying.

The shift was visible not only in the size and demographics of the crowds, but even more so in their tactics. Though most confrontations with police remained defensive – the umbrella itself becoming a symbol because of its use as a shield against pepper spray – the movement decisively shifted the practical terms of protest toward the active blockading of public space, a tactic formerly forbidden by the activists' own standards of civility. But the blockades of the Umbrella Movement turned out to be nothing but a prologue, offering a preliminary political opening within which the initial terms of the subsequent insurrection in 2019 could be formulated. Over the following years, even the pan-democratic old guard would increasingly be forced to operate on the political field set by younger organisers who had gotten their first taste of politics building barricades out of trash cans and traffic signs in Mong Kok in the autumn of 2014. While the events of 2014 were, in their moment, the largest social disruption since the 1967 riots, it was only in 2019 that the same scale of rebellion was reached – and responded to with a crackdown similar in scope to that which followed the uprising fifty years prior.

The size and scale of the 2014 movement already signalled a much deeper discontent building among the city's youth. Although still clothed in the language of democracy, this disaffection was instead something more like a resonant, if somewhat nihilistic rejection of what life in the city had become:

> People bemoan skyrocketing rents, the inhuman levels of inequality, inflation in the price of food and public transport, and the government's tendency to simply ignore the vast swaths of people sitting at the bottom of society. One speaker at an open mic made the common – if simply wrong – argument: 'Why is Hong Kong just a couple of rich people and so many poor people?! Because we have no democracy!' … Democracy has thereby come to designate less the practical application of a popular voting system and more a sort of elusive panacea, capable of somehow curing all social ills.[28]

28 Ibid.

In response to the influx of new and often distinctly economic demands, both the old guard pan-democrats and the new liberals aligned with organisations like Scholarism and the Hong Kong Federation of Students attempted to reassert the core demands of the original occupation, holding small discussion groups to educate young protestors about the proper ways of protesting and posting signs that read: 'We only fight for DEMOCRACY, nothing else.'[29] In this way, the movement effectively bifurcated, with the liberal faction centred on Admiralty (near the legislative council building and the central business district) and a more amorphous faction unified mostly by their rejection of pan-democratic standards centred on the blockades in the commercial district of Mong Kok.

3 The City-State

As the liberals sought to pull the protests back onto the terrain of civil society, others pushed in the opposite direction. Signs began to be posted warning protestors to not trust 'leftist pricks,' emphasising that the movement had 'no leaders' and agitating against 'small-group discussion,' a common tool used by civil society groups to assert their intellectual leadership. Then, in November, a handful of masked youths burst through police lines outside the legislative building and smashed their way through the glass doors. This was the first window broken during a protest in the city for as long as anyone could remember. But the action was universally condemned by the pan-democrats, the young liberals, and the press, triggering calls for protestors to end the occupation. Always concerned with respectability – and of course the sources of their philanthropic funding – the leaders of the various civil society groups grew especially anxious when reception of the protests began to sour overseas, with the *Wall Street Journal* arguing in response to the window-smashing that 'the democrats have the strength, but using it effectively may require leaving the streets.'[30] Though controversial, however, there was little evidence that the action was unpopular. In retrospect, it was yet another sign of events to come. But it was also something more decisive, marking the point at which both the mainstream liberals and the smaller and much more marginal militant leftists proved unable to seize the tactical edge within the movement. Thus, the

29 Ibid.

30 Opinion 19 November 2014 'Broken Windows in Hong Kong', *The Wall Street Journal*. https://www.wsj.com/articles/broken-windows-in-hong-kong-1416443557

smashed windows of the LegCo opened onto a darker path, as an ascendant faction of localists was able to play off popular resentment, seize the tactical initiative, and sharpen the mass nihilism of the movement to serve their distinctly right-wing political aims.

A new, far-right pole within Hong Kong politics had begun to cohere as early as 2011, when scholar and former government advisor Chin Wan (the penname of Horace Chin Wan-kan) published *On the Hong Kong City-State*, which advocated for the secession of the city from a 'neo-imperialist' mainland. Though Chin himself would later abandon many of these earlier positions in favour of a 'more enigmatic position of seeing Hong Kong as a bastion of Chinese spiritual renaissance,' the book nonetheless played a central role in the rise of what would come to be known as the 'localist' current.[31] At a broader level, his arguments also served to reshape the presumptions of many liberals, triggering splits within established parties like the League of Social Democrats and influencing the younger activists within organisations such as Scholarism. At the heart of these differences was Chin's reappraisal of the core tenets of the city's liberal politics. Not only did he 'put forward a political agenda of Hong Kong First and Hong Kong People First,' which emphasised themes of cultural and economic 'autonomy,' he also explicitly 'opposed the "democratic reunification theory" initially advocated by the pan-democrats, arguing that, even if there were democracy in China, it would not necessarily be beneficial for Hong Kong' and that the pan-democrats had long wasted time and energy on attempting to support human rights and democratic reforms on the mainland.[32] Against the liberal orthodoxy, he advocated for Hong Kong to become a fully independent city-state, similar to Singapore. More jarringly, he even went so far as to argue that Hong Kongers are ethnically distinct from mainlanders, endorsing popular racist portrayals of the latter as foreign 'locusts' descending on the city from outside.

By the time that Chin published his book, rising economic integration had been accompanied by increasing prejudice against mainlanders, with racist depictions conflating reasonable class critiques – for example, criticism of an influx of wealthy mainland firms and capitalists purchasing high-end properties and driving up real estate prices – with a more generic prejudice against all mainlanders, including students, tourists, and those engaged in minor forms

31 Hung 2022b, p. 183.

32 These quotations come from a comprehensive report on the 2019 protests and their historical context produced by an anonymous activist from Hong Kong in 2021 (Anonymous 2021, p. 49). No English-language translation of the full text currently exists. The translations here are therefore the author's own.

of daily cross-border commerce. Though portrayed as 'smugglers,' most of the latter were simply glorified couriers tasked with buying bags full of consumer goods in Hong Kong and transiting them across the border into Shenzhen. At the time, however, such accounts seemed to be confirmed by phenomena such as birth tourism, a rise in immigrants overstaying their visas, and periodic shortages of consumer goods in the suburban centres closest to the border. The cultural campaigns of the old colonial authority had not only succeeded in creating a certain self-image of the 'polite' and 'civil' Hong Konger but had, in classic British fashion, also ensured that this civility was propped up by an elitist chauvinism. Now, as the polite culture of old Hong Kong decayed, only the chauvinism remained.

Mainlanders were often portrayed as voracious, unrefined peasants harried by an 'authoritarian' government and hungry for Hong Kong's wealth and privilege. For the pan-democratic old guard, this had stoked humanitarian sympathy. For the new wave of liberals and localists, it earned nothing but contempt. Often, it was even cast in a conspiratorial light. Though Hong Kongers had long been free to cross the border to manage business affairs on the mainland, the gradual lifting of immigration controls in the opposite direction was seen as a nefarious measure by the central government to flood the city with rapacious immigrants. In response, 'self-proclaimed localists organised rallies and protests against mainland Chinese tourists and smugglers,' which often resulted in 'brawls between localist protestors and mainland smugglers, retail owners specialised in the mainland tourist business, and pro-establishment groups.'[33] Localists also pursued institutional campaigns, as in 2015, when a coalition of right-wing groups marched on the Immigration Department demanding that an undocumented 12-year-old be deported back to the mainland.[34]

By the middle of the decade, Chin's 'city-statism' was an increasingly archaic variant among several divergent localist schools of thought. In some cases, new branches of localism took shape when former liberals split off from the pan-democratic establishment, as when well-known democratic politician and media personality Raymond Wong Yuk-man founded a political education arm within the League of Social Democrats which then led a split from the organisation, joining first the populist People Power Party and then cohering into an

33 Hung 2022b, p. 183.

34 Lai Ying-kit and Ngo, Jennifer, 22 May 2015 'Abandoned boy, 12, divides opinion in bid for Hong Kong residency', *South China Morning Post*. https://www.scmp.com/news/hong-kong/hong-kong-law-and-crime/article/1806767/abandoned-boy-12-divides-opinion-bid-hong

independent localist organisation called the Proletariat Political Institute. Similarly, Wong's protégé, Wong Yeung-tat, went on to found localist group Civic Passion, which would become one of the most active right-wing organisations in the Umbrella Movement – with one of its members allegedly leading the charge to smash through the windows at the LegCo. Other localist organisations emerged independent of the pro-democratic establishment entirely, with many founded by young people who had participated in the Umbrella Movement and blamed its failure on the vacillation of the liberal leadership. Hong Kong Indigenous was among the most militant of these groups, going on to lead anti-immigrant marches and participate in clashes with mainland shoppers. When the government initiated a crackdown against street hawkers in Mong Kok during the New Year celebrations in 2016, Hong Kong Indigenous put out a call for supporters to come defend the streetside stalls, which were widely seen as a symbol of Hong Kong culture. Protestors swarmed into the area as police attempted to clear out the street hawkers, resulting in a series of escalating clashes that would come to be known as the 'fishball riots' or the 'fishball revolution,' which *The Economist* soon bemoaned as the 'worst outbreak of rioting since the 1960s.'[35]

Similar groups soon arose among students and professionals, such as the Hong Kong National Party, which openly advocated for outright independence from the mainland. As early as 2014, the Hong Kong University student union newspaper had published a piece exploring the prospects of building a nationalist movement in Hong Kong. This article would eventually help lay the groundwork for an even more extreme program than that theorised by early localists such as Chin. In contrast to Chin's city-statism, which emphasised the supposed ethnic conflict between Hong Kong and China but maintained that 'Hong Kong has preserved the spirit of Chinese culture more than the mainland' and was therefore not a distinct nation, these younger localists cited Benedict Anderson's well-known study of the origins of nationalism, *Imagined Communities*, to argue that the city's distinct linguistic (primarily Cantonese-speaking) and historic heritage (including the influence of the British) had constituted Hong Kong as a new nation sufficiently distinct from China to deserve its own sovereign rule. These nationalist impulses would later be expressed in the emergence of a 'self-determination faction' (自决派) calling for a referendum to decide Hong Kong's political future, including the option of independence. The new generation of localists also outperformed the earlier

35 The Economist, 13 February 2016 'Street Violence and Politics', *The Economist*. https://www.economist.com/china/2016/02/13/street-violence-and-politics

city-statists in their antagonistic opposition to civil society, opposing endless marches, sit-ins, and big stage lectures in favour of open antagonism with the police.[36]

Meanwhile, a wide range of right-wing groups began to spring up somewhat organically in response to local subsistence issues, mostly in the New Territories, and many of these would go on to field candidates in the 2015 and 2016 elections. Localist groups Youngspiration and Kowloon East Community won seats in the 2015 District Council elections and Edward Leung, one of the founders of Hong Kong Indigenous, received some 66,000 votes in the New Territories East by-election in early 2016. In the Legislative Council election later that same year, localist groups formed two major electoral coalitions. One was constituted by organisations that had emerged from the pan-democratic camp, including Civic Passion, the Proletarian Political Institute, and Chin Wan's Hong Kong Resurgence Order; while another formed between six independent localist groups founded by youth who had been involved in the Umbrella Movement. In addition to Youngspiration, the latter coalition included a range of organisations whose local focus was evident in their names: Kowloon East Community, Tin Shui Wai New Force, Cheung Sha Wan Community Establishment Power, Tsz Wan Shan Constructive Power, and Tuen Mun Community, all joined together under the banner 'ALLinHK.' They were joined by a new generation of pro-democratic organisations founded by younger liberals, such as Demosisto, founded by Joshua Wong and Agnes Chow, from Scholarism, and Nathan Law, former secretary-general of the Hong Kong Federation of Students. Despite having several of their candidates invalidated by electoral officials, both the localists and the younger generation of liberals won major races, with Youngspiration's Baggio Leung and Yau Wai-ching winning seats alongside Demosisto's Nathan Law, making Law and Yau the youngest-ever candidates to be elected to the legislative council. Altogether, localist candidates won six seats and received some 20 percent of the vote.[37] Subsequent surveys revealed 'that candidates with localist orientations were particularly popular among the unpropertied and younger voters.'[38]

But more significant was their growing influence outside the electoral realm, symbolised by the rising share of Hong Kongers explicitly identifying with the

36 Anonymous 2021, pp. 61–4.

37 Cheung, Gary and Lam, Jeffie 5 September 2016 'Rise of localists in Hong Kong polls set to bring headaches for Beijing, analysts say', *South China Morning Post*. https://www.scmp.com/news/hong-kong/politics/article/2015349/rise-localists-hong-kong-polls-set-bring-headaches-beijing

38 Hung 2022b, p. 186.

movement and by the growing influence of localist slogans across civil society. Following a global trend, Hong Kong's far-right had begun to adopt tactics and aesthetics elsewhere associated with the anarchist movement. Similar to neo-fascists in Ukraine, Thailand, and Italy, many groups even described their positions as a form of 'national' anarchism or 'autonomy,' contrasted to the authoritarian 'communism' of the mainland.[39] Others used essentially third positionist talking points, claiming to go 'beyond left and right.' Most important, however, was their ability to appropriate the popular visual language and antagonistic political practices normally associated with the far left. For example, as early as 2014, it was the city's localists, rather than its anarchists, who began to popularise both the tactic and aesthetics of the black bloc. Similarly, it was the localists who stood up to the police, leading militant defence campaigns in local villages and window-smashing assaults against the halls of power. Meanwhile, as localist organisations arose across the New Territories to address local subsistence issues, they set up a mixture of advocacy campaigns and anarchist-style mutual aid and solidarity networks. Because of the aesthetic overlap, localist branding even began to be circulated within the cultural currents of the left in other countries – a phenomenon that only accelerated as these symbols became associated with increasingly riotous activity.

These efforts retained a close and mutually reinforcing relationship with the changing sentiment of the population in general. Localists by no means caused these shifts in consciousness, which were instead rooted in the very real livelihood issues and the visible rise of mainland firms, which colluded with and gradually displacing Hong Kong capitalists from the upper echelons of power. But the localists helped to facilitate, intensify, and feed the popular reaction to these issues, channelling righteous anger into xenophobia and a mindless worship of the US empire as the only possible defence against an impending 'Chinese' takeover. In fact, this very narrative was only possible because of gradual shifts in identity, induced by the changing fate of Hong Kongers within the global order: Over these same years, public opinion surveys showed a sharp decline in the share of respondents identifying themselves as 'Chinese,' paired by a sharp rise in those identifying as 'Hong Kongers,' which was again most extreme when sorted according to age: 'In the 18–29 age group, Hong Konger versus Chinese identity was at a staggering 81.8 versus 1.8 percent in December 2019.'[40] This was a major shift from a decade prior when, according to the same survey in 2007, roughly 40 percent of the general populace had identified as

39 For an overview of these trends, see: NPC 2014.

40 Hung 2022b, p. 185.

Chinese, while just under 20 percent identified as Hong Kongers. Similarly, as early as 2016, another survey showed nearly 40 percent of those aged 15–24 in support of Hong Kong independence.

At the larger scale, the influence of the new nationalist politics became visible in the steady spread of localist slogans and visual styles throughout civil society: the colours black and yellow or black and white, violently splattered calligraphy, militant figures posed under overwrought language calling for heroic revolution against an evil, foreign elite. During the by-election that same year, Edward Leung, co-founder of Hong Kong Indigenous – who would ultimately be barred from running due to his earlier avowed support for Hong Kong independence – coined one such slogan: 'Liberate Hong Kong, Revolution of Our Times.' Within the space of only a few years, flags bearing the phrase would be seen fluttering through clouds of tear gas, pale letters flickering orange in the firelight.

4 Excess and Extant

Over the past century, politics was slowly strangled to death through a series of deepening defeats. Worse still, the corpse of this politics was then propped up as a sort of puppet made to act out the motions of the once-living thing. In the absence of practical experience with real political conflict – which is replaced by empty and endless theoretical and historical debates, campaigns to 'raise awareness,' legalistic quibbles over the wording of policy, and a wealth of arts and media projects – people increasingly come to understand 'politics' as such to be a largely discursive, pedagogical or merely administrative affair. At best, political activity is seen as a sort of competition between beliefs, systematised in the programmatic positions of different formal groups, each of which seeks to attract converts by explaining its stance on various issues and arguing out the consequences. As political theorists Paul Torino and Adrian Wohlleben argue: 'Contemporary politics sees in action nothing but a *conversation* between constituencies and populations in society.'[41] This notion of politics seems to make sense precisely because the major political forces of the twentieth century were able to lay out their own core projects in the form of coherent platforms. In fact, these platforms are all they left behind, like fossils that seem to express the essence of the extinct organism. But these fossilised remains also serve to veil the dynamic process that once gave them life.

41 Torino and Wohlleben 2019.

Within this prevailing paradigm, politics begins as an idea and then proceeds into reality through the practical commitment of self-aware activists who, if successful, spread this idea to others and thereby create new converts to the activist project. This is the fundamental presumption of liberal political philosophy and serves as the basis for both the civil society paradigm and the various formal and informal sects of the self-described 'left' in its multifarious forms. But, just as the fossil alone fails to capture the truly living aspects of the beast – from its basic phenotype to its ecological niche – this fossilised approach to politics fails to approximate the living thing. The attempts to emulate the political programs of these dead generations are much like those of the early palaeontologists building behemoths from bone fragments or Renaissance sculptors mimicking the blanched ruins of Rome. They can ultimately produce nothing but monstrous, melancholic facsimiles. This is because they take the endpoint of long sequences of political organisation as the starting point of struggle, rather than seeing in living proletarian antagonism the potential for the practical elaboration of a future politics.

Living struggles proceed in the exact opposite direction, beginning not from thought but from action. Consciousness enters the body through the skin. This is why, as Neocosmos frames it, the question of political subjectivity must be located in the 'excessive' elements of the event, which supersede the status quo rather than being simply 'expressive' of identities intrinsic to it. Subjectivity itself is therefore a fundamentally collective process rather than an individual articulation of static identity within the extant world.[42] According to Badiou, this distinction also separates out the mere critique of capitalism from communism as a positive political project, with the latter building on but also exceeding the former: 'it is "class" that is an analytical and descriptive concept, a "cold" concept, and "masses" that is the concept with which the active principle of the riots, real change, is designated.'[43] But the excess inherent in the event is always, ultimately, born from and forced to struggle within a given expressive situation. Political subjectivity (which is a precondition for any grand strategic 'program') only emerges through the tactical organisation of partisan 'fidelity' to the excessive, universal elements of the event. Insofar as a communist 'idea' can be said to exist, it does so only through the practical elaboration of this excess within and against the expressive situation from which it erupts.

And it is this link to political action that distinguishes this theory of partisanship and social subjectivity from the more idealistic, individualist variant

42 Neocosmos 2016, p. 27.

43 Badiou 2012, p. 91.

offered by thinkers such as those in the French collective Tiqqun (and, later, the Invisible Committee), for whom anti-programmatic politics is, essentially, a voluntarist affair taking place outside of or above the expressive world from which it has departed. Recognising the same division noted by Badiou between structural analysis and political action, their conclusion is to simply jettison the former: 'To continue the struggle today, we will have to scrap the notion of class and with it the whole entourage of certified origins, reassuring sociologisms, identity protheses.'[44] In its place, they treat the excessive as if it could be wholly severed from its origins in the extant social world and thereby boiled down an intrinsic battle occurring within the will of the individual: 'The front line no longer cuts through the middle of society; it now runs through the middle of each of us, between what makes us a *citizen*, our predicates, and all the rest. It is thus in each of us that war is being waged between imperial socialisation and that which already eludes it.'[45] From this perspective, politics is not a social affair so much as an ethical one. And, of course, the approach evokes a certain elitism, since the choice to 'scrap the notion of class' is neither novel in theory – it is in fact a common ideological theme taken up by what we might think of as the 'lumpen' portion of the middle strata – nor is it practically possible for the majority of the species, who have no choice but to experience class not as a 'notion' but as a daily torture.

Though this voluntarist approach drives to the gut of partisan affect, it also ignores the inherently dialectical relationship between event and extant, excessive and expressive, or politics and state. But it is precisely in this dialectic that subjectivity abides. As Neocosmos stresses, the process of subjectivation can only take place through an ongoing organisational struggle to maintain and repeatedly resurrect the universality of the event within and against the delimited nature of the 'identitarian objects' that compose the status quo. Only in this fashion can subjects 'be rigorously understood as produced and not as given; they can in fact be conceived as produced through a politics, as the products of subjectivities … and not the other way round, thus avoiding the collapse into idealism.'[46] Subjectivity is therefore the contradictory process whereby the excessive universality that has emerged from some initial, identitarian expression of extant interests is turned back against the limits posed by these extant identities themselves, generating novel, universal forms of emancipatory politics that contain the potential to dissolve these identities in practice – in the

44 Tiqqun 2016, p. 12.
45 Ibid.
46 Neocosmos 2016, p. 26.

long-run, through the revolutionary process – and, for this very reason, must continue to engage with them as the material realities faced by the individuals involved in the struggle.

In simpler terms: political uprisings obviously have causes that can be identified in their environment and those who join in these uprisings do so at least in part because they themselves are a product of this same environment. Similarly, the impact of particular uprisings can be traced in their transformation of conventional political discourse, as when major strike waves elevate previously siloed demands for, say, wage increases in a particular workplace, into a broadly recognisable goal now expressed in the form of a general demand for an increased minimum wage across entire sectors or even national markets. But, once an uprising begins, it also becomes a sort of end in itself for those involved. From the outside, this can only appear irrational, especially when it appears to undercut the very material interests of the participants – as in the common objection against rioters who burn down 'their own' neighbourhoods or against workers who threaten to bankrupt their employer with a strike and thereby risk losing their job entirely. And yet, from within the space of the uprising, it is precisely this feedback loop of self-referential excess – the gut-feeling that drives participants to extend, intensify, and elaborate the uprising – that rapidly and collectively transforms those involved while also exerting a gravitational force capable of pulling and tearing the discursive fabric of the status quo in which the uprising takes place.

An uprising that was initially an expression of material interests by one group of proletarians – a strike at one factory or a call to investigate a single police murder in a single city, for example – thereby takes on an unstable universality, continuing to express those initial demands while also coming to encompass broader social interests and, beyond this, evolving into an expansive process worth sustaining in and of itself. The singular struggle thereby becomes a sort of mass noun within which all individual interests are but one part, with an agency that exceeds the sum of these parts: it thereby becomes 'the' struggle, 'the' rebellion, 'the' revolution, worthy of defence and requiring work of its participants. It compels its own creation, much as a piece of art can be said to compel the artist in the very process of its emergence across the canvas. In Badiou's words: 'The conservative "heartlands" disappear and all the focus is on what might be called a *massive minority*.'[47] For Neocosmos, this 'massive minority' embodies, in practice, the universality necessary for a struggle to take on a truly emancipatory potential.

47 Badiou 2012, p. 91.

Often, the impact is only evident in the aftermath. Once the most volatile elements of the uprising have had their doors kicked down and been herded into their prison cells, the remainder pack up and go home, imagining it to all have been a resounding defeat. And of course it is. But, at the same time, previously unspeakable political positions have suddenly become commonplace. Think, for example, of how topics like 'mass incarceration' were once the exclusive purview of a few academics and several small Marxist study groups, before popular struggles rendered them broadly visible. In fact, for Tronti, this impact is precisely why the 'froth' of proletarian antagonism can ultimately, via its defeat, serve as a developmental force for capital. Thus, Tronti points to the massive and violent strikes that rocked the United States in the 1920s and 1930s, noting how, despite being driven forward and knit together by the efforts of organisations that retained at least some commitment to revolution, could ultimately serve to reform the mechanisms of capitalist governance. Though these strikes were, on average, defeated, they nonetheless forced the absorption of working-class demands into day-to-day governance precisely because these demands were universalised through the action of a 'massive minority' of militant workers. More importantly, this reshaping of the political landscape also helps to sculpt the very social environment that is among the causal factors in uprisings – implying that every event, although defeated, can help to create the very conditions conducive to its resurrection in a subsequent event of larger scale.

5 Parties of Action

After all, social domination will continually generate rebellion against it. Spurred on by material conditions, masses of people will always be attracted to concrete acts of disruption, sacrifice, and service in the name of something more than this darkling world. Marx periodically referred to this undercurrent of class struggle as the 'party in the broad historical sense,' which serves as the basic substrate on which more intentional political organisation arises.[48] The 'historical party' is thus the name for the repeated regeneration of political subjectivity by the conflictual reproduction of capitalist society itself. At any given moment, this historical party both expresses the contours of the given terrain

48 The concept is latent in many of Marx's political writings. But it is perhaps most explicit in a letter written to Ferdinand Freiligrath in 1860, where Marx distinguishes the historic concept of the party from any empirical association with a single formal organisation such as the Communist League: 'I have tried to dispel the misunderstanding arising out of

from which it emerged and reshapes that terrain through its very emergence, creating a new ground for new iterations of the same process to continue in the future. Thus, the gains won by the strike wave of the 1920s and 1930s in the US, studied by Tronti, become part of the extant situation shaping the postwar strike waves in Italy, with which Tronti sought to engage.

Since social domination is fundamentally rooted in power over the productive process, this also means that the character of political subjectivity in any given place and time is also conditioned by the changing character of productive subjectivity – which itself shapes the specific forms of knowledge and particular image of the world held by individuals via the various relationships that they have to the process of production. However, the transitive dynamic at play here is not so much deterministic as probabilistic, with exposure to certain types of work and unemployment posing different questions of power and subsistence that then make different forms of political action seem more or less 'natural' or effective. This then shapes the political potentials visible to people in the first place. But transitivity also goes both ways. Since subjectivation is an ongoing process of struggle, its extant baseline can then be changed through the emergence of more intensive and intentional forms of political organisation, which help to breach the constraints imposed by the common sense of our productive subjectivity, making the machinations of the property system visible in a broader perspective and posing entirely different terms for the building of political power. In this way, the seemingly natural political conclusions drawn by the utopian socialists of the early workers' movement gradually gave way to more mature political movements in a long process of practical failures followed by polemical defeats, as more organised socialist parties attempted to make sense of and move beyond the dead-ends they had inherited.

Today, we are left with little inheritance at all. The defeat of the global communist revolutions appears, to us, much as the defeat of the radical republican revolutions in the eighteenth century must have to those in the early workers' movement: as little more than romantic ruins seen from afar. But even if we find ourselves in an era of diminished political organisation, we are nonetheless also in a period of rising political potential. The vitality of the historical party waxes and wanes over time – a process conditioned by both large-scale structural transformations of capitalist society and the contingent outcomes of ongoing social conflicts. Hong Kong's civil society culture emerged in a period

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the impression that by "party" I meant a "League" that expired eight years ago, or an editorial board that was disbanded twelve years ago. By party, I meant the party in the broad historical sense' (Marx 2010, p. 80). The concept was then developed in a more formal fashion by Bordiga (2020, p. 482) and Camatte (1974).

of waning global struggle and ascendant accumulation, when the communist movement was in its darkest eclipse. The forms of political organisation that had once structured that movement were in ruins and the once-proud political subjectivity of the old orthodoxy had shattered into a crumbling mosaic of slivering sects staffed by sad, splenetic zealots. In this context, the 'new social movements' of the social action faction appeared to carry with them precisely the grassroots vitality that the crumbling orthodoxy (represented in Hong Kong by the Maoists) had come to lack. Similarly, the new organisational models offered by civil society were attractive precisely because of their contrast with stultified sects bogged down in procedure and polemics.

But, sometime after the turn of the century, the falling tide slowed, paused, and then began to reverse. Spattered riots and occupations from Buenos Aires to Oaxaca to Paris to Athens to Bangkok signalled the stirring of the long-sleeping party. Then came Badiou's 'rebirth of history,' as insurrections spread across North Africa, riotous strikes rocked the factory districts of the Pearl River Delta, and public squares were occupied across Europe and North America. Though individual struggles would spark and sputter – usually fading out, sometimes triggering military intervention or degenerating into gruesome civil wars and NATO interventions – the overall cadence of global class conflict had undergone an undeniable change. At the empirical level, the shift is easily measurable in various datasets that track social conflict and strike activity at the global scale.[49] And yet the transformation is also so obvious that it eludes any simple description, existing as something closer to an intuition. In part, this is because the historical party awakened to find that its long hibernation had both caused and been caused by the world-shaking defeat and subsequent ruin of the communist movement that had once been rooted in it. Political subjectivity had therefore fallen back to its baseline. And this is why so many thinkers likened the uprisings of the early 2010s to the inchoate revolutions of 1848 in Europe – events which were in retrospect the first stirrings of the modern socialist movement but, at the time, expressed themselves in vague populist terms, and proved completely unprepared for the repressive response of the ruling class.

49 It can, for example, be charted by using general news-aggregation data from the Global Database of Events, Language, and Tone (GDELT), by using data from the Global Social Protest Research Group at Johns Hopkins, by combining country- or language-specific datasets, such as strike trackers in the US (for example, the ILR Labour Action Tracker) and China (China Labour Bulletin Strikes Map, and data collected by the Wickedonna group), or even by using more conventional datasets tracking open armed conflict, such as the ACLED conflict index.

The resurrection of the historical party over the course of the 2010s was therefore defined not by any single struggle or tactic (i.e. 'riots' versus 'strikes') and was not encoded in the emergence of any particular forms of organisation but was instead visible in a series of interrelated trends, which together offer the best summary: the generalisation of some degree of social upheaval across international boundaries, the increased frequency at which new struggles emerged, the degree to which the very visibility of these struggles was able to trigger similar conflicts elsewhere, and the new intensities that any given upheaval was able to reach. Tactically, the only consistency to these events was the very loose sense in which, given general trends in deindustrialisation, they tended to take as their targets the state (namely, its standing army of police) and any visible outposts of circulation (shopping centres, financial districts, etc.), rather than productive infrastructure, thereby reviving the importance of tactics such as riots, blockades, and occupations, which had been more common to struggles in the early history of capitalism, prior to the advent of modern industry. Regardless of the exact tactics, however, the vitality of the historical party ultimately lies in its insatiable drive to exceed the scope of any single subsistence struggle and its general inability to pass beyond 'immediate' issues of survival and resistance. Though this appears as a 'demandlessness' or even a nihilism – and it often is – individual struggles tend to actually overflow with individual demands deriving from such divergent sources and aimed at such distinct goals that they can only cohere through their shared rejection of the present order. The historical party is therefore an 'antepolitical' stage of subjectivation or perhaps the preface to political subjectivity as such. It is the question of organisation, asked again and again until some segment of the class attempts to answer.

Often, this antepolitical sentiment is expressed as nothing more than a loose agreement that the current regime must fall. Rather than unifying behind a political platform with clear objectives, then, these struggles therefore subsist and propagate through simple, reproducible symbols. Torino and Wohlleben call these symbols 'memes with force.' In 2018, the yellow vest became the prototypical example:

> A meme does not necessarily alter the *content* of a struggle. In France, for instance, the catalyzing factors are without a doubt eminently familiar social pressures, such as the rising cost of living, diminishing social mobility, cuts to public services, a triumphant neoliberal government who spits in the eyes of the working poor, etc. What the meme of the Yellow Vest offers is a malleable *form* within which this content can assume the force of an intervention. Within every political struggle there is a minimal form-

> alization; to this extent, the meme reopens the basic question of the Party, and offers what is perhaps the minimal basis for organizing a force of rupture in the twenty-first century. The fluidity of the meme makes it possible to join a march, a blockade or a roundabout occupation without having to buy into the 'common interest' or the legitimizing 'beliefs' of a movement. It does not solve, but simply defers the question of a common grammar of suffering to a later point.[50]

The very fluidity of the symbol therefore allows it to become a vehicle for action, imbuing the meme with an almost-magical power to construct new political subjectivities upward from the sightless, seething waters of the historical party. When a meme takes on such force it thereby becomes more than a mere meme – understood as the somewhat modular name for a fluid and reproducible symbol – and instead becomes a *sigil*. It obtains an occult power of attraction that enables the symbol to sculpt social substances that are otherwise inaccessible. Sigils thereby become the initial waypoints around which organisation is drawn upward from the surging tide of history.

Over the course of the 2010s, the momentum of the historical party only seemed to grow. Hong Kong was no exception. It was, however, an illustration of the structural limits that fetter such struggles, aggravated in this case by the region's Cold War history and the particularly strong separation imposed between the urban core and its industrial hinterland across the border. In such a context, localists and liberals had a pre-determined advantage. Because of their uncompromising focus on action rather than well-meaning discourse – contra the pan-democrats – the localists proved particularly capable of exploiting this advantage and amplifying their initially marginal influence. Here the work of Chin Wan was again prophetic. Against the established pan-democratic theme of 'peace and justice,' Chin emphasised motifs of 'courage' and 'heroism,' which were subsequently embodied in the brazen actions of the small group of localists who had led the assault on the LegCo. Though the window-smashing was condemned by the city's conventional left, the action itself spoke louder than any pan-democratic bullhorn. Soon, localist groups committed to similarly 'courageous' acts were springing up across the city, taking on practical tasks within local subsistence struggles and building out social bases among the most receptive segments of small businesspeople and petty professionals living in the cheaper housing complexes on the urban fringe.

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50 Torino and Wohlleben 2019.

In other words, rather than attempting to recruit others by simply advertising their positions and arguing out their program, they sought to build power directly. Within military theory, this process is understood as a struggle for 'competitive control' over an open field of social conflict. In such a struggle, groups 'don't become strong because people support their ideology; on the contrary, people start supporting a given group's ideology in places where that group is *already* strong.'[51] In such a context, political partisanship is defined first and foremost by what kind of actions are taken in the face of chaotic, rapid-fire struggles that exceed the conventional coordinates of the social movement. As Torino and Wohlleben argue, we must therefore speak of 'radical actions, not radical actors.' Similarly, politics does not descend down into the mind from the lofted heights of the political platform but instead percolates upward from mass activity itself. Rather than the platform, politics is therefore driven by an oath to action. Formal parties – the name for any group, whether makeshift or systematic, that is consciously addressing and attempting to overcome the limits to a struggle – cohere out of a shared commitment to acting together in fidelity to the political potentials opened by the conflict. Organisations are therefore appendages to action, not the other way around.

In the initial movement from riot to insurrection, this is precisely why formal parties that disavow their formal aspect, operating as 'informal organizations,' tend to prove most effective, while large, formal organisations tend to flounder. As Bonanno explains:

> There must be areas in your own situations where tensions are being generated. Contact with these situations, if it continues on an ideological basis, will end up having you pushed out. Contact must be on a different basis, organised but different. This cannot be done by any large organization with its traditionally illuministic or romantic claim to serve as a point of reference and synthesis in a host of different situations; it can only be done by an organization that is agile, flexible and able to adapt.[52]

In Hong Kong, what existed of the left remained largely consistent with the pan-democratic approach, making 'illuministic or romantic' claims to provide a platform that could serve to synthesise the demands of the excluded. And, of course, this synthesis was rejected by the excluded themselves, who rightfully saw it as a stifling and demobilising imposition from outside.

51 Kilcullen 2013, p. 125.
52 Bonanno 1988, p. 25.

Only the far-right were able to manoeuvre around this conundrum, flexibly providing a series of tactical interventions able to provide consistency to the series of political events pockmarking the decade and thereby intensifying each in turn. Thus, although the right benefited from the fact that structural trends had predisposed the general populace toward localist talking points, this alone cannot account for their success. It was their practical activity first within the Umbrella Movement and then in its aftermath – especially in places such as the New Territories, where they came to the aid of embattled villagers, disgruntled professionals, and an entire generation of disillusioned youth – that gave the localists the edge in the struggle for 'competitive control.' Through a combination of courageous street actions, local service provision, intensive network-building, and ongoing propaganda efforts, the localists were thereby able to amplify their power well beyond their own small numbers. This was possible because of the productive tension forged between their otherwise limited agency and the extant ground from which it emerged. The events of 2019 certainly had a straightforward series of social causes. Over the previous decade, the 'mainlandization of the economy [had driven] a wedge between its beneficiaries (the older propertied class) and its victims (unpropertied youngsters) …'[53] But this content was only able to take on a political force through the memetic forms that had emerged from localist activity. Their success in this regard was visible in the rapid growth of their own formal parties and, even more so, in the way that the liberals and leftists were forced to tail after them, not only abandoning 'peace and justice' for similar themes of 'heroism' and 'courage' but even gradually adopting the entire visual language of the far-right itself, which would soon come to constitute the fundamental sigils of the ensuing insurrection.

Throughout, the details of the localist program remained undeveloped. When confronted about how, exactly, an independent Hong Kong would operate, given that the city was so economically dependent on the mainland, localists could offer no coherent plan other than vague references to the 'free port' or the saving grace of the US or UK. Most who attempted to think through the consequences of independence would soon conclude that there was no other choice but something like a protracted guerilla war – eventually turning the most extreme factions of the far-right toward increasingly terroristic activity as mass protests in 2019–20 were ground down by the dual blow of police repression and the outbreak of the pandemic – or some sort of *deus ex machina* dreamed up by the more idiotic of the city's liberals, in which Trump would slap

53 Hung 2022b, p. 187.

sanctions China and send in the seventh fleet to defend Hong Kong without, somehow, triggering a new world war in the process. By 2019, this latter hope would even see young liberals waving American flags and grovelling at the feet of right-wing US politicians like Ted Cruz and Josh Hawley.

For most, though, the desire for independence was little more than the vague and impossible idea that Hong Kong could enter the interstate system as a country like any other while somehow retaining its ties of trade and finance with the mainland. Basic questions of production and economic power were almost entirely ignored. In fact, this willing ignorance was one of the few factors truly shared between all the different localist currents. In one particularly laughable moment, a friend asked a young localist how an independent Hong Kong would get food supplies – obviously, nearly all the food consumed in the city is imported, often from the mainland – to which the localist gestured toward a series of small organic farms in the New Territories, none of which were capable of producing enough to feed a single residential building, much less one of the world's largest cities. In other words, the coherence or reasoned character of the localist program had essentially no influence on the political success of localist positions. Meanwhile, even the older faction of distinctly Hong Kong capitalists such as Li Ka-shing would mostly keep quiet about the political unrest, since they understood perfectly well their *de facto* dependence on the engine of accumulation across the border. Had there been any other option, there would have been a legitimate risk of rebellion among at least some of the city's elite. But none ever materialised.

6 Be Water

It is 2019 and I am watching a fire kindle in the middle of one of Hong Kong's busiest streets. Someone had tried to ignite a trashcan outside Prince Edward Station, but it was just barely smouldering. Tendrils of dark smoke rich with the incense of burning plastic reach up toward the fading neon sky. Nearby, a crowd of youths are hurling bricks and insults down from a pedestrian overpass toward a police line moving slowly up the thoroughfare. As a language, Cantonese is not simply rich in curses but embroidered in them. Behind me, another squadron of riot police sweeps in to clear one of Mong Kok's major intersections, shining spotlights toward the small crowd of protestors pushing back from the edges. The spotlights have a surreal effect, turning the armoured bodies of the police into mere shadows moving behind a veil of white, as if the intersection has been cut out of the fabric of the city entirely. The rest of us are left to move in the darkness left behind.

In that moment, the abrasive character of the bright white light is itself symbolic. Over the course of the 2010s, one of the many symbols of Hong Kong's alleged death was the slow disappearance of the city's distinctive neon signage, widely seen to be a unique form of cultural heritage. As these signs were gradually replaced by cheaper LEDs, many Hong Kongers bemoaned the change as a sort of symbolic conquest, mirroring the influx of mainland capital and literally recasting the cityscape to resemble the cold-lit glitter of newly risen urban centres like Shenzhen. In contrast, the protestors are clad in black, pockmarked with warm yellow helmets and red flares sizzling in the shadows. Here and there, smoke bombs bloom like ink in water. On the edge of the intersection, people seem to emerge from everywhere at once, as if the very fabric of the city is alive against the alien intrusion of the police in their hypercube of LEDs. Protestors mill about in the middle of Nathan Road, indistinguishable from the pedestrians on the sidewalk. Graffiti covers every surface like a new skin layered on the old. In the space of only a few years, the long-banished spectre of the rabble had returned, backlit by a fading neon sky.

By then, the riots had been smouldering for months.[54] Similar to the mass mobilisations of the early 2000s that had catapulted the pan-democrats into leading positions within civil society, the 2019 unrest was triggered by ongoing attempts to legislate the anti-subversion and national security measures required by Article 23 of Hong Kong's Basic Law, which is something like the mini-constitution laying out the city's legal standards under the 'one country, two systems' paradigm, officially in place until 2047. While demonstrations in 2003 had been sparked by a particularly draconian version of the law, the 2019 protests were triggered when the LegCo was set to pass what should have seemingly been an uncontroversial amendment to the Fugitive Ordinance. The amendment was proposed to allow for the extradition of a Hong Kong man who had murdered his pregnant girlfriend in Taiwan and subsequently returned to the city, where he confessed to police. However, in the absence of a formal extradition treaty (which Hong Kong could not sign with Taiwan, given the unique political status of both islands) and with no general-purpose extradition law on the books, the police had no legal ability to send the man back to Taiwan to stand trial.

On its own, such an amendment would likely have garnered little opposition. However, the city's pro-establishment ruling party seized on the issue to flesh out further elements of the long-unfinished Article 23 mandate, with

54 A concise but detailed timeline of events can be found in Anonymous 2021, pp. 69–70.

the proposed amendment not simply allowing for extradition to Taiwan or foreign territories but specifically giving the Chief Executive authority to approve extraditions on a case-by-case basis for an entire range of crimes. Of course, the most important feature was that the proposed law would include extraditions to the mainland. Ironically, one of the groups to initially voice opposition to the law were therefore the city's pro-business organisations, concerned that the amendment would be used to crack down on capital flight and other forms of tax evasion and illicit financing. But more vocal opposition came from civil society and the judicial sector, who pointed out that the law effectively circumvented the legal system and constituted a 'human rights violation' insofar as it would technically allow for activists who had fled the mainland to be extradited on political charges.

Thus, as pan-democratic lawmakers launched a filibuster campaign against the bill within the initial committee hearings, protests began to build up outside the Legislative Council Complex. In mid-June of 2019, hundreds of thousands surrounded the building, clashed with police, and successfully halted proceedings. In response, authorities declared the gathering a riot and forcefully cleared the area, tear gassing tens of thousands of individuals in one night.[55] Widely covered by local media, the confrontation then triggered a second round of protests against police brutality. At one of these subsequent protests, a man who had climbed up several stories of construction scaffolding to unfurl an anti-extradition banner fell to his death. The same day, Chief Executive Carrie Lam announced that the bill would be suspended. Despite this, the death only further invigorated the protests. On the following day, demonstrations again ballooned into the hundreds of thousands, with the dead protestor's slogans going on to form the basis of the 'five demands' that would serve as a central theme for the movement.[56] Even larger gatherings followed, peaking with the annual 1 July march, which likely reached half a million people. As the main 1 July event died down, a radical wing of protestors then successfully stormed the LegCo building, propping up a banner behind the speaker's podium that read 'there are no rioters, there's only tyranny.' Though denounced

55 SCMP Reporters 12 June 2019 'As it happened: Hong Kong police and extradition protesters renew clashes as tear gas flies', *South China Morning Post*. https://www.scmp.com/news/hong-kong/politics/article/3014104/thousands-block-roads-downtown-hong-kong-defiant-protest

56 SCMP Reporters 16 June 2019 'As it happened: A historic day in Hong Kong concludes peacefully as organisers claim almost 2 million people came out in protest against the fugitive bill', *South China Morning Post*. https://www.scmp.com/news/hong-kong/politics/article/3014695/sea-black-hong-kong-will-march-against-suspended

by the government, the action was cheered on by supporters of the movement. Thus, the very tactic that had proved so controversial in 2014 had, by 2019, become conventional.

After 1 July, protests permeated every corner of the city. Soon, conflicts with police were accompanied by clashes between protestors and anonymous thugs widely believed to be triad members aligned with the government. When one group of white-clad gangsters began indiscriminately attacking people (particularly anyone wearing black) at the Yuen Long metro station on 21 July, the police only arrived some 40 minutes later despite receiving thousands of calls reporting the incident. A week or so prior, pro-establishment LegCo member Junius Ho had called for the people of Yuen Long to 'wipe out' the protestors. After the attack he doubled down, claiming that the white-clad mob was just 'defending their home.'[57] The Yuen Long attack had the effect of eliminating any remaining faith in the police or the government, marking the point at which the movement began to win the support of an enormous portion of the city's population. Building on the momentum, a general strike was called in early August. While it fell far short of being truly 'general,' hundreds of thousands nonetheless joined from over 20 sectors and hundreds of flights were cancelled due to the participation of air traffic controllers.[58] Soon, the airport itself became a central theatre in the conflict, as protestors staged a three-day sit-in against police brutality, forcing the cancellation of even more flights. The strike also demonstrated the temporary outmanoeuvring of the HKCTU, which supported the action but 'on its own did not have the power to mobilise; rather, it required the disruptive power of a few determined unions and individual activists.'[59]

Particularly violent confrontations then broke out on 1 October (China's National Day), during which an 18-year-old protestor was shot in the chest with live rounds at close range by the police.[60] Soon after, the government began ramping up legal measures against the demonstrations – for example, by banning the use of face masks in public gatherings – to which demonstrat-

57 Sum Lok-kei and Su Xinqi 22 July 2019 'Pro-Beijing lawmaker Junius Ho defends white-clad mob that attacked civilians in Hong Kong MTR station, says they can be "pardoned for defending their home"', *South China Morning Post*. https://www.scmp.com/news/hong-kong/politics/article/3019621/pro-beijing-lawmaker-junius-ho-defends-white-clad-mob

58 Lee, Danny 5 August 2019 'Hundreds of flights cancelled leaving travellers facing chaos as citywide strike action hits Hong Kong International Airport', *South China Morning Post*. https://www.scmp.com/news/hong-kong/politics/article/3021412/hundreds-flights-cancelled-leaving-travellers-facing-chaos

59 Lin 2021.

60 The protestor survived but, after recovering, was forced into hiding as repression in the

ors responded by vandalising pro-Beijing businesses and shutting down the subway system. Then, in early November, a black-clad student fell from the third storey of a car park while protestors were clashing with police nearby, with many suspecting that he had fallen while fleeing from the tear gas, and some paranoid that he had, in fact, been pushed by the police (this was soon disproven, but the rumour continued to spread). The death triggered another general strike, this time accompanied by a citywide traffic blockade, which saw even more violent confrontations – including yet another instance in which police fired live rounds at protestors.

Over the previous months, calls had been made for traditional strike activity to evolve into a 'three strikes' campaign (recalling that originally proposed in the wake of Tiananmen but then abandoned), which would pair workplace walkouts with a targeted consumer boycott and the closure of sympathetic businesses. The general strike beginning on 11 November was the first instance in which the basic strategy began to be implemented, albeit in a circumscribed fashion. Work stoppages remained limited in scope. However, they were not only accompanied by boycotts and a few shop closures but now also blockades of major thoroughfares and the subway system, essentially paralyzing portions of the city. Particularly notable features of the November strike included the enthusiastic involvement of office workers in the central business district and the success of protestors in the suburbs in shutting down the subway system, preventing many from commuting into the city for work in the first place.[61]

Larger and more frequent protests also began to occur on university campuses, with student unions shifting into a mode of total mobilisation. Barricades were erected at Hong Kong Baptist University, and other campuses throughout the city saw running battles with police. Then, on 17 November, one of these demonstrations evolved into a full-on siege, as protestors occupied the campus of Hong Kong Polytechnic University (PolyU) and blockaded the Cross-Harbour Tunnel linking Hong Kong Island to Kowloon – one of the city's most important thoroughfares. The siege would not only see the erection of extensive fortifications by the embattled protestors on campus, who met police advances with increasingly forceful measures – including one soon-to-be-famous case in which a protestor shot an arrow through the calf of a police

city increased. In the summer of 2022, he was caught attempting to flee to Taiwan and imprisoned for the next year, finally pleading guilty to contempt of court, rioting, and assault on an officer in April of 2023.

61 Ruckus, Ralf 18 November 2019 '"Saam Baa" in Hong Kong – Three Strikes Paralyze the City', *Nao Qingchu*. https://nqch.org/2019/11/18/saam-baa-in-hong-kong-three-strikes-paralyze-the-city/

officer – but also saw demonstrators begin to amass outside the police cordon in an attempt to break through to free the besieged protestors. This second group rained Molotov cocktails down on the cordon and coordinated a series of offensive charges, to which police responded with tear gas, water cannons, and mass arrests. In the end, the siege stretched on for over a week, devolving into a war of attrition. Protestors inside the university were starved of supplies and slowly worn down. Some fled through storm drains, some were captured, others surrendered.

Overall, the Siege of PolyU resulted in the largest concentration of arrests in the entire uprising. In subsequent years, the siege would therefore be a recurring source of new prosecutions (usually on riot charges), resulting in a series of lengthy prison sentences. The siege was also significant insofar as demonstrators were forced to abandon, or at least evolve, the 'Be Water' strategy that had dominated the protests up to that point, in which protestors had explicitly refused to attempt to take and hold space against the police. Partially inspired by the quagmire of the Umbrella Movement's mass occupations, 'Be Water' tactics served multiple functions. Most importantly, the strategy inverted the roles of police and protestors. Rather than protestors seizing mostly symbolic corners of public space, converting them into a 'big stage' from which the messaging of the movement could be amplified, and then being forced out by police, 'Be Water' forced police themselves to take and hold space against the adaptive assaults of demonstrators who, when confronted, seemed able to melt back into the urban fabric at will. Protestors were able to erect blockades at multiple points in the city with minimal effort, while the government was then forced to commit time and effort to resolidify the city's suddenly fluid cartography. The siege then reversed these roles again, marking an inadvertent regression toward less developed and more easily defeated tactics of territorial protest.

Ultimately, the attrition of the protestors inside the campus also proved symbolic, insofar as it seemed to echo the gradual burnout being experienced by demonstrators more generally. Already drained from months of non-stop political activity, the turn to even more intense mobilisation across multiple fields of social conflict began to take a toll. The occupation itself seemed to have been induced, at least in part, by the desire to settle in somewhere and stop the ceaseless motion of day-to-day mobilisation. This suggested that certain tactical limits of the 'Be Water' strategy had been reached without any new practices able to further compose the movement immediately evident.

In the aftermath of the strike and the siege, many sought to step back, hoping to build more sustainable models for political power over the long term. Though initially posed as attempts at organisational adaptation capable of

overcoming the limits of both non-stop street action and further attempts to forcibly occupy territory, these mostly proved to be a return to the depoliticising conventions of pan-democratic electoralism and the well-trod path of social movement organising. Very loosely, we might identify three or four major dimensions to the trend. The first was electoral, building on years of work by pan-democrats struggling to outpace localist competitors. The second was broadly rooted in civil society and, specifically, within the rising tide of social movement unionism. And the third focused on consumption and commerce, visible in the emergence of a 'yellow economic circle' of pro-movement businesses. However, if these three trends defined the momentum of the majority, the movement's slow decline also stimulated a small minority toward increasingly extreme and even terroristic action, which composed a fourth aspect of the unsolvable puzzle that the movement now found itself faced with.[62]

Despite their differences, all four dimensions of the decline were ultimately united by their mutual refusal to push the struggle toward certain terrains of conflict precluded by the zealous liberalism that had served as the movement's default political consciousness. Most importantly (and despite agitation by a far-left minority), both the actual economic base of the city – as a logistical and financial entrepôt – and any attempt to reach into its industrial hinterland across the border were *de facto* off limits. Over the preceding five years, crackdowns against labour organisers across the border and the gradual adoption of localist themes had seen even prominent pan-democrats turn their attention away from the mainland. Meanwhile, among the strangest facets of the movement was the fact that, despite widespread blockades of subways, thoroughfares, and even the airport, it never once sought to shut down the Port of Hong Kong. Similarly, although a number of new unions were formed across the city, very little attention was given to the very logistics and construction workers who had led the longest and most militant strikes in recent history (the port strike in 2013, and a barbenders strike in 2007). Even those who turned to adventurist terrorism chose relatively anodyne targets. The members of a group calling itself 'Returning Valiant' were alleged to have formulated a plan to bomb courtrooms, tunnels, subway lines, and trash cans distributed throughout the city, completely ignoring key infrastructures of economic power, such as the stock exchange.[63]

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62 In at least one instance (that of the group Returning Valiant, founded by highschoolers), bombing plans were formulated by a semi-formal organisation. But most cases involved only one or two individuals, taking on the familiar character of informal 'lone wolf' attacks.

63 Ni, Vincent 6 July 2021 'Hong Kong police say nine arrested over alleged bomb plot,' *The Guardian*. https://www.theguardian.com/world/2021/jul/06/hong-kong-police-say-nine-arrested-alleged-bomb-plot

7 Civil Society Strikes Back

In retrospect, November was likely the peak of the movement, bringing together a series of decisive events that set the trajectory of the uprising toward its slow unwinding. This decline was guaranteed not simply by rising repression, nor by the sudden outbreak of the pandemic a couple of months later – though both, of course, played important roles – but ironically by the very success the movement had enjoyed in garnering public support. The 'three strikes' actions helped to demonstrate this popularity, as the semi-paralysis of the city over the course of multiple days saw widespread support despite the disruption. The demonstrations in support of the besieged PolyU protestors also illustrated how the radical actions of black bloc protestors on the frontlines had come to be seen not as the separate activities of a radical minority but instead as a crucial component of a variegated but continuous body of protest rooted in a broad popular base. This ultimately resulted in the gradual dissolution of old ideological divides between 'violence' and 'non-violence,' with different activities taken on in context of a complex social struggle increasingly seen to play complementary roles. In June, only 38 percent of respondents had agreed that '"radical tactics" were useful in making the state listen to protestors' demands.'[64] But that number had increased to 62 percent by September. Similarly, by autumn, 'over 90% of participants agreed with the statement that "Bringing peaceful and militant actions together is the most effective way to get results."'[65] This knowledge was materialised in widely-distributed slogans emphasising this variegated unity – 'no divisions, no renunciations, no betrayals,' 'each fighting in our own way, we climb the mountain together,' 'the peaceful and the brave are indivisible, we rise and fall together' – as well as in memes illustrating the various roles that could be taken on by demonstrators in the midst of a protest.

Popular support was also visible in the electoral realm. The District Council election held shortly after the end of the PolyU Siege saw record voter turnout and resulted in a landslide victory for democratic candidates. Though District Council seats were normally dominated by pro-establishment parties, years of preparation by both liberals and localists had seen a massive expansion in voter registration, especially among the young. Roughly 380,000 people registered in the year prior to the election and the number of those aged 18–35 increased by

64 Chuang 8 June 2020 'Welcome to the Frontlines: Beyond Violence and Non-Violence,' *Chuang Blog*. https://chuangcn.org/2020/06/frontlines/

65 Ibid.

12.3 percent in the same period.[66] As the first election to occur after the initiation of the protests, it was widely seen as a referendum on the movement.

In the end, pro-establishment parties received the largest defeat in history, losing 96 of their seats, including those held by prominent incumbents such as Junius Ho. Parties affiliated with the democrats gained absolute majorities in all districts, tripling their seats from 124 to 388 (out of 479 total seats, 452 of which were directly elected). Maybe the most significant aspect of the election, however, was how it signalled the gradual return of the pan-democratic old guard to the forefront of politics, now alongside the localists. On the one hand, the localist parties performed well in the election. Civic Passion, for example, received some 14,326 votes, up from just over 3,000 in 2015; Tsz Wan Shan Constructive Power won 10,160 votes, compared to 3,633 in 2015; and the Tuen Mun Community Network (which had slowly shifted from more explicit localism to a sort of liberal-localist hybrid) won just over 20,000 votes, compared to 5,196 in 2015. But most of the losses suffered by pro-establishment forces came at the hands of the established liberal parties. Altogether, Tuen Mun Community and Civic Passion only won .69 and .49 percent of the total votes, respectively. In contrast, the Democratic Party won 362,275 votes (12.36 percent of the total), compared to 196,068 in 2015. Meanwhile, the Civic Party almost tripled its share, from 52,346 in 2015 to 141,713 in 2019.[67]

Though the general upswing in popular protest guaranteed that the most established of the anti-establishment figures would see some increase in support, the return of the pan-democrats cannot be attributed to this alone. Instead, the old guard of civil society had themselves been transformed under the pressure of the localists and the younger liberals. Many pan-democratic parties had at least partially adopted the aesthetics and policy elements of the localist program, a trend already visible in the emergence of parties such as the Neo Democrats, who added anti-immigration measures to their platform, performed well in the 2015 elections, and even obtained the seat of disqualified localist Baggio Leung in a by-election in 2018. Elsewhere, leadership was transferred to a slightly younger generation of pan-democrats, as in the

66 Lam, Jeffie 16 November 2019 'Voter registration spikes in Hong Kong amid protests', *Inkstone News*. https://web.archive.org/web/20200514115233/https://www.inkstonenews.com/politics/hong-kong-protests-youth-voter-registration-spikes-amid-anti-government-unrest/article/3021139

67 Election figures come from the official government reports, available at the Hong Kong elections government website and summarised on the respective Wikipedia entries for each election. The 2019 figures are available here: https://www.elections.gov.hk/dc2019/eng/results.html; and the 2015 figures are available here: https://data.gov.hk/en-data/dataset/hk-reo-reopsi01-election-result-dc-2015dce.

Civic Party, where Alvin Yeung assumed the chairmanship from Alan Leong, an aging politician who had run for Chief Executive on the democratic ticket in 2007. Figures such as Yeung helped to bridge the gap between the older pan-democrats and the younger generation of liberals without fully endorsing the more extreme politics of the latter.

On the other hand, established pan-democratic figures such as Benny Tai – responsible for the original call to 'Occupy Central with Peace and Love' in 2014 – had toned down their earlier emphasis on civility and begun to put together a series of plans intended to mobilise the popular momentum to guarantee back-to-back electoral majorities. The first of these was 'Project Storm,' through which Tai designed the cross-party coordination mechanism and an overall strategy that had allowed the pan-democrats to win their landslide in the District Council elections. This, in turn, would give them over 100 additional seats on the Election Committee, which selects the Chief Executive.[68]

Meanwhile, as street actions began to wane into the winter, the general strikes gave way to a proliferation of newly founded social movement unions spanning the service sector. Though seemingly novel, this move in fact represented a return to established civil society practices, albeit at a new scale and with renewed vitality. Even though many of these new unions refused to affiliate with the HKCTU itself, they nonetheless emulated the same basic model. After all, the confederation and its affiliates had not only emerged from the same social movement milieu as the pan-democrats – collaborating in their electoral schemes via its own Labour Party – but had also formed in 1990 and therefore 'found itself operating in a largely post-industrial economy …' As a result, rather than tracing their heritage to mass manufacturing, Hong Kong's 'stronger worker organisations were instead white-collar, professional, and public-sector unions,' and it was for this very reason that '[t]he HKCTU and its allies developed a tradition of social movement unionism in which the lack of workplace-based power was compensated by the mobilization of social groups or solidarity action and public pressure.'[69] But this also reproduced a common failure of civil society organising, in which the work of NGOs, student groups, paid union staff and other specialised activists would become an increasingly necessary substitute for the non-activity of workers themselves: 'Union activity and mobilisation at the workplace level did not always match

68 Lam, Jeffie 30 April 2017 'Hong Kong Occupy co-founder Benny Tai unveils "Project Storm" to win more district council seats for pan-democrats', *South China Morning Post*. https://www.scmp.com/news/hong-kong/politics/article/2091875/hong-kong-occupy-co-founder-benny-tai-unveils-project-storm

69 Lin 2021.

the high profile of the HKCTU, with a discrepancy between the high-level political engagement of the confederation and the weakness of worker power at the grassroots level.'[70] This substitutionism was precisely what had hampered the dockworkers strike in 2013.[71] It was difficult to see, then, how the emergence of new unions along the same lines would help to bolster the power of the uprising, rather than rein it in.

The new unions also tended to be concentrated in white collar and professional sectors rather than among the city's many low-wage service workers. This mirrored participation in the earlier 'general strikes,' with surveys of participants revealing that 'over 72 per cent … were bringing home more than the Hong Kong median wage … and 82 per cent had received some form of higher education.'[72] Toward the end of the year, a new 'HK On Strike' alliance formed, bringing together a loose network of 43 unions representing 'civil servants, medical workers, finance industry employees, engineers, and speech therapists.'[73] Other unions formed among engineers, graphic designers, railway workers, and hotel staff. These unions expressed their support for the movement by signing joint petitions, holding flash mobs, and joining demonstrations, but were rarely large enough to strike. This is not to say that economic issues were not acknowledged within the movement. In fact, during the first and largest of the 'general strikes' in August, a survey among participants revealed that '89 per cent … agreed with the view that working hours in Hong Kong were too long, 94 per cent … agreed with the view that the gap between rich and poor was unfair, and 97 per cent agreed that the Hong Kong government privileged big corporations over ordinary people.'[74] However, while HK On Strike 'aimed to unionise 10 percent of workers in each sector' in order to 'provide a collective voice on political, labour, and economic issues' and even 'initiate a "real" general strike in the future,' it ultimately fell far short of this goal. Most new union activity remained centred on the same relatively higher-paid, better-educated sectors as before.[75]

In part, the growth of the new labour movement was stunted because its energy was directed toward ulterior motives. Rather than aiming mainly at industrial action, the unionisation drive was, from its outset, also intended to ensure that pro-movement forces would gain a larger share of votes within the

70 Ibid.
71 Chan, et al. 2019.
72 Pringle 2021, p. 134.
73 Tsui and Chan 2021.
74 Pringle 2021, p. 134.
75 Tsui and Chan 2021.

functional constituencies. These include a 'Labour' constituency that draws its votes from all members of formally registered unions, as well as a range of professional constituencies, many of which directly overlap with the sectors targeted for unionisation. For example, the four largest constituencies with the most votes are: 'Education,' with the largest base, composed of a range of teachers, principals, university representatives and other full-time academic staff; 'Medical and Health Services,' the second largest, covering most medical workers; 'Accountancy,' the third largest, in which all certified public accountants get a vote; and 'Social Welfare,' the fourth largest, covering all social workers. Thus, the new unions were primarily 'seen as an extension of the political movement and as a voting bloc to secure elected positions in the legislature,' rather than as organs for building power directly.[76]

In response to this strategy, the pro-establishment Federation of Trade Unions also began registering hundreds of new unions over the course of 2020, making it difficult to approximate exactly how fast the pro-movement unions were growing.[77] In fact, by largely failing to engage in workplace issues or put forward broader struggles over the cost of living, many of the new unions had already been struggling to even retain the members that had signed up in the final months of 2019, even before repression intensified in the summer of 2020. Meanwhile, rather than increasing, economic conflicts actually declined throughout this period, with the prospect of a more successful general strike receding despite the on-paper growth of the new unions. As political pressure intensified and the electoral strategy collapsed, affiliation with a union was soon turned into a liability. By the end of 2021, most had disbanded or were effectively defunct.

The sole strike carried out by the new unions was itself symbolic of the more general predicament. Conducted by the Hong Kong Authority Employees Alliance – representing medical workers employed by the city's public hospitals, clinics and other medical institutions – the strike was held in February of 2020 in response to the government's refusal to fully seal the border with the mainland during the first few months of the coronavirus outbreak. Particularly notable was the fact that membership in the union had skyrocketed after it had issued a public call to strike, growing 'from 300 members in December 2019 – two months after its launch – to 10,000 by the end of January' at which point it included some '20 percent of the city's public medical sector employees.' Even though the five-day strike was limited to

76 Lin 2021.

77 Pringle 2021, p. 135.

'non-essential' staff, roughly 7,000 workers took part.[78] The strike also received widespread popular support, with surveys by the Public Opinion Research Institute showing some 60 percent support among a random sample of Hong Kongers.[79]

Within international reporting, the strike would be portrayed as a noble effort to stop the spread of the pandemic and ensure adequate protections for medical workers. But the union itself initially stressed the political dimensions of the issue popular with localists, first calling for uncompromising border closures to keep out mainlanders and only later emphasising the wider range of demands, such as workplace safety. Many participants made the chauvinistic and racist undertones explicit, as when one participating nurse gave her own argument for the border closures: 'All of the Chinese always tell lies and cross over into Hong Kong, and they can spread the virus.'[80] Comments such as this expressed a more general sentiment that had taken hold as the pandemic spread. During that same week, two small bombs were discovered on a train headed for the border and, after being discovered by subway staff, a pro-movement Telegram channel claimed responsibility, explaining that the planned bombing was an attempt to scare mainlanders from crossing the border, accusing them of 'spreading disease.' The authors of the post issued a warning: 'We will defend our city. You're welcome to experience the power of the bombs.'[81]

Even more underwhelming was the turn to the commercial sphere. Among the stranger scenes I experienced in November was that of meeting some old friends in a bar in Mong Kok while small skirmishes with the police played out at nearby intersections. When the tear gas began to waft in too heavily or police began an approach, the staff would merely draw down the garage-style metal security door, temporarily locking everyone inside, where business proceeded as usual. Throughout the course of the movement, it was common for fleeing protestors to be rescued by sympathetic businesses in this fashion, providing one of many methods whereby they were able to melt back into the dense urban fabric. At its most developed, attempts to build up this sort of pro-movement sentiment within the commercial sphere eventually evolved into

78 Tsui and Chan 2021.

79 McLaughlin, Timothy 6 February 2020 'Democracy Drives Labour in a Hyper-Capitalist City', *The Atlantic*. https://www.theatlantic.com/international/archive/2020/02/unions-hong-kong-protest-coronavirus/606136/

80 Ibid.

81 Cheng, Kris 3 February 2020 'Two homemade bombs found at Lo Wu MTR station train, Hong Kong police say,' *Hong Kong Free Press*. https://hongkongfp.com/2020/02/03/two-homemade-bombs-found-lo-wu-mtr-station-train-hong-kong-police-say/

the idea of the 'Yellow Economic Circle,' which was intended to be a collection of small companies openly promoting movement messaging, receiving preferential business from supporters, and even potentially pooling funds to assist in organising.

Soon, new maps began to circulate among residents, indicating 'yellow' (pro-movement) and 'blue' (pro-establishment) businesses. The goal was to divide the space of the city, making visible the underlying political commitments of each territory in the absence of outright occupations and attempting to strangle the flow of cash going to pro-establishment forces and increase traffic to pro-movement ones. In practice, however, this was a loose and largely aspirational effort, as commerce continued operating in the city much as it had before. Meanwhile, although 'yellow' businesses did see an initial boost of support during the pandemic, they also soon became targets of more stringent crackdowns, with police selectively enforcing social distancing policies to punish the pro-movement restaurants so conveniently pointed out on the map.[82] According to one of the most popular mapping apps cataloguing 'yellow' versus 'blue' shops, the number of newly listed 'yellow' shops grew the fastest through the end of 2020 at just over 5,000, slowing thereafter. By early 2022, the number had climbed to nearly 6,000, but growing repression had already seen many forced to take down slogans and remove pro-movement items and books from shelves.[83] By 2023, some of the most prominent pro-movement shops and petty capitalists had begun to defect for the sake of remaining in business.[84]

This failed drive to construct some sort of supporting infrastructure within the commercial sphere was representative of the more general deadlock of the movement itself. In broad terms, the Yellow Economic Circle symbolised the weakness of liberal and localist faith in the power of commerce. By trying to build up small businesses, the movement was diverted from deepening its own disruption of the economy. The shift to the commercial sphere there-

82 Shen, Simon 19 May 2020 'How the Yellow Economic Circle Can Revolutionise Hong Kong', *The Diplomat*. https://thediplomat.com/2020/05/how-the-yellow-economic-circle-can-revolutionise-hong-kong/

83 Lee, Peter 12 June 2022 '"They haven't gone away": 3 years on, Hong Kong's pro-democracy "yellow economy" has paled, but support remains', *Hong Kong Free Press*. https://hongkongfp.com/2022/06/12/they-havent-gone-away-hong-kongs-pro-democracy-yellow-economy-remains-even-if-support-for-it-has-paled/

84 Chan, Kahon 22 March 2023 'Hong Kong 47: AbouThai founder cuts ties with "yellow economic circle" as he vows to support city, nation', *South China Morning Post*. https://www.scmp.com/news/hong-kong/politics/article/3214471/hong-kong-47-abouthai-founder-cuts-ties-yellow-economic-circle-he-vows-support-city-nation

fore unveiled an aporia baked into the liberal presumptions of most protestors, who saw no contradiction between encouraging commerce and advancing the movement. In fact, mercantile activities often took on a somewhat mythic form, with the city's many brightly lit malls, bustling streetside stands and, above all, the 'free port' churning somewhere in the background all seen as something like the lifeforce of 'Hong Kong' itself.

In its strongest form, the Yellow Economic Circle was naively seen as a method to re-localise this commerce and thereby revive the mythic merchant spirit of the city. Its emergence during the pandemic – when the sudden disappearance of mainland tourists devastated the retail sector – seemed at first to confirm this potential, with many supporters praising the rise of a 'community economy' and numerous businesses turning to 'yellow' branding to boost sales. Similarly, unemployed professionals who had been supporters of the movement began to formulate their own start-ups in sectors ranging from advertising and design to tech, with some supporters seeing immense potential for growth via private investment funds not controlled by state-owned banks.[85] On the other hand, the turn to commercial ventures also prevented the movement from threatening further economic disruptions and arguably even helped to revive trade with the mainland. At a deeper level, both the new wave of social movement unionism and the turn to commercial ventures also illustrated the basic riddle that confronts anyone attempting to build any sort of sustained power in a largely post-industrial city where any assault or seizure of productive infrastructure was stopped dead by the 'glass floor.' In this case, however, the 'glass floor' separating most people's lives from production was a literal border dividing the city from its hinterland, inhabited by the very people that the localists scorned.

8 Burn with Us

This conundrum eventually led to an embrace of the dead-end itself, represented in the gradual adoption of the logic of *laam chau*. Usually translated as 'mutual destruction' or 'burnism,' the Cantonese phrase combines the words for 'to embrace or fasten together' and 'stir-fry' to communicate the sentiment behind popular protest phrases such as 'if we burn, you burn with us' or 'better ashes than dust.' Though *laam chau* had been coined to describe a specific strategy of petitioning for Western sanctions – first on Hong

85 Shen 2020.

Kong government officials, and then on China as a whole – it quickly came to encompass a much broader meaning, embodied in scorched earth slogans and increasingly destructive attacks against the urban fabric. As protests intensified throughout autumn, exhaustion was accompanied by a worsening sense of desperation. Mass arrests and the always-imminent prospect of military intervention (which never occurred, despite some plainclothes deployments of soldiers on the fringes) seemed to drive home the reality that even the most successful of insurrections in the city was ultimately doomed. Among many young people, this awakened a productive, if vindictive, nihilism that largely abandoned strategic questions, burning away the myths of both the liberals and the localists in a pyrrhic wave of proletarian rage, raw, tragic, and ephemeral. This amorphous, mass-political nihilism was no longer a rebellion against the death of the city but was instead an embodiment of Hong Kong as a city already dead. That year, the ghost festival had occurred shortly after the first of the general strikes and airport occupations in mid-August, almost precisely marking the point at which mass protests began to tilt toward insurrection. The carnival lifted itself from the shadows and into the streets. For once, it seemed that the hungry dead refused to be ferried back to the karmic millstone. In response, the kings of hell summoned their armies. Nothing would end quietly.

Soon, the nihilistic sentiment became so pervasive that the basic dead-end faced by the movement was recognised not only by its extreme fringe but even by the pan-democrats. *Laam chau* thereby came full circle, returning to the geopolitical themes of its earlier formulation. In a manifesto published in April of 2020 titled '10 steps to *laam chau*' (often translated as '10 steps to burn with us'), Benny Tai laid out a forecast of the movement's prospects, predicting 10 stages wherein the government would gradually disqualify pro-movement politicians from running in the upcoming Legislative Council election scheduled for September, requiring a series of 'Plan B' and 'Plan C' candidates who would nonetheless win in a landslide, just as they had in the District Council elections. Once in power, the democrats would gain veto power over the city's budget, and Tai argued that the veto should then be used as a weapon against the central government, intentionally forcing the city into a fiscal crisis if Hong Kongers were not granted universal suffrage.

But, according to Tai, this legislative assault would then impel the central government to declare a state of emergency, disband the LegCo, and detain members of the pro-democracy camp *en masse*. And it was in the final step of the *laaam chau* electoral strategy that the basic failure of vision became most apparent: For Tai, the central government's harsh crackdown would at last see the US and other world powers move in to impose devastating eco-

nomic and political sanctions on China.[86] In other words, the entire strategy was predicated on a faith in the vitality of the liberal world order and the willingness and ability of the US to reassert its geopolitical hegemony in a strong form, even though such a decision would be against its immediate economic interests and even pose the risk of world war. Nonetheless, only the intervention of the world's leading imperial powers could ensure that the destruction would truly be 'mutual.' In this sense, the abysmal failure of the pan-democratic version of *laam chau* could be traced to its naïve faith in the persistence of a *pax Americana* that, viewed from any other perspective, had already begun to crumble.

Later, it became apparent that the logic of *laam chau* had also been incorporated into Tai's planning for the upcoming legislative election, as revealed in a subsequent trial over his involvement in the planning of an unofficial primary in the summer of 2020, during which he'd successfully encouraged other democrats to sign onto his strategy of using the budgetary veto as a weapon in precisely the fashion he'd laid out in his manifesto.[87] But Tai's forecast proved overly optimistic and his liberal faith in the imperial saving grace of the United States would be shaken. First, the central government moved in much more rapidly than expected. At the end of June, well before any election could take place, an expansive National Security Law was promulgated via the Standing Committee of the National People's Congress – thereby completely bypassing the LegCo – which gave the government widespread powers to unseat elected politicians, arrest those suspected of threatening national security, and imprison individuals under a range of new terrorism, subversion, and secession charges.

When Tai and other democrats nonetheless proceeded with their plan to hold an unofficial primary in July (in which more than 600,000 people cast votes) candidates associated with the localists and the younger liberals quickly pulled into the lead, entirely knocking out established candidates from the smaller pan-democratic parties (such as former Trotskyist Leung Kwok-hung with the League of Social Democrats and HKCTU chairperson Carol Ng with the Labour Party). The government then immediately disqualified 12 democratic

86 The Standard, 6 January 2021 'Explainer: what is Benny Tai's "10 steps to burn with us"', *The Standard*. https://www.thestandard.com.hk/breaking-news/section/4/162727/Explainer:-what-is-Benny-Tai%27s-%2210-steps-to-burn-with-us%22

87 Ho, Kelly 7 February 2023 'Hong Kong 47: Activist's voting campaign formed "backbone" of unofficial primaries, nat. security trial hears', *Hong Kong Free Press*. https://hongkongfp.com/2023/02/07/hong-kong-47-activists-voting-campaign-formed-backbone-of-unofficial-primaries-nat-security-trial-hears/

candidates, including four incumbents, with 21 others placed under review (for context, this was in a election for a total of 70 seats in the LegCo). This was in line with Tai's predictions, and 'Plan B' candidates had already been lined up. But before further disqualifications were even decided, Chief Executive Carrie Lam cited a resurgence in coronavirus cases to invoke emergency powers and postpone the election until the following year.

Tai's strategy had envisioned a slow electoral chess match. Instead, the central government simply reaffirmed the basic fact that Hong Kong had never been and would never be a democracy, sweeping the pieces from the board. The passage of the National Security Law was followed by the revival of a colonial-era sedition ordinance, both of which were applied alongside new pandemic restrictions and criminal charges such as riot and illegal assembly to detain and charge thousands of individuals in the years that followed. More than 50 candidates in the primaries were arrested, charged, and found guilty of subverting state power, including Tai himself (he was ultimately sentenced to 10 years in prison). Pro-movement media tycoon Jimmy Lai was charged with a range of crimes including fraud and colluding with foreign forces to endanger national security. Leading independent media and civil society organisations were targeted one by one, each raided by police, their leadership charged under the new law, and the organisations themselves forced to disband. Universities cut their ties with their student unions. Meanwhile, by the fall of 2021, almost all the new labour unions founded in 2020 had been disbanded, alongside many older social movement unions. In October of that year, the HKCTU itself was dissolved and its leadership arrested. Government agencies began to require employees to take national security oaths. Books documenting the movement were banned. Pro-movement signage and products were gradually removed from the shelves as the 'yellow economic circle' slowly closed. Schools and universities fired outspoken staff and adopted new state-mandated textbooks and national security curricula.

At a more general level, the sheer scale of the uprising also ensured that repression would have to target masses of people, rather than just prominent individuals or leading organisations. According to the largest-scale survey conducted prior to the crackdown: '52.6% of respondents participated in at least one "anti-extradition" activity, which means that roughly 3.45 million people participated in some form,' a rate that was 'higher than that of the Umbrella Movement (18–20%) and the Arab Spring (35%).'[88] In total, some 32.5 percent of respondents said that they had directly assisted protestors and 16.3 percent

88 Anonymous 2021, p. 103.

said that they had engaged in various encirclement, occupation, and blockade activities, with just over 4 percent admitting that they had directly clashed with police. To place this into context: according to the same population estimate, 4 percent would be just over 250,000 people.[89] And these numbers were even more pronounced among the youth, with nearly 80 percent of those 15–29 years old reporting having participated in some form, 33.2 percent having manned the barricades and 12.3 percent having clashed with police.

Meanwhile, a large majority of participants described their own political viewpoints as 'localist' (81.6 percent) or 'pan-democratic' (73 percent), with the high shares of each indicating that the two were not clearly opposed, as many respondents marked down both – in contrast, another survey of the general population, rather than participants, showed only 20 percent identifying as localists and 31 percent as pan-democrats, while a full 39 percent described themselves as having no particular political position.[90] Also interesting, however, is the fact that a large number of these individuals with no political allegiance nonetheless participated in the protests, with 24.3 percent of all participants refusing the labels of localist, pan-democrat, or pro-establishment. In terms of the most active participation, however, it was clear that those who explicitly identified as localists dominated, with 11 percent claiming to have clashed with police, versus just 5.6 percent of those identified as pan-democrats, and 0.7 percent of those with no political affiliation.[91]

Meanwhile, other polling confirmed that the movement enjoyed majority support among essentially all social strata in the city and that this support tended to grow over time, with 'nearly 60% of the public still supporting the movement' as late as June 2020, shortly before the National Security Law was passed. But the strength of this support was uneven, with 'those who are younger, those who identify more strongly with Hong Kong identity, and those with higher

89 It is important to note, however, that virtually all of these polls were conducted exclusively among Cantonese-speaking respondents who could read traditional Chinese characters. This excludes the city's roughly 400,000 foreign domestic workers, many of the 600,000 residents classified as ethnic minorities, and many of the mainlanders living in the city as students or workers. The exclusion of such groups is itself telling: 'Prior to the movement, these groups were not usually seen as members of the "Hong Kong People" in mainstream social discourse' (Ibid, p. 107). Though this may have changed somewhat after certain excluded groups offered support to the movement, helping to build ties and hold joint events, it is nonetheless correct to say that the bias represented by the surveys remained the prevailing bias of the movement itself.

90 The former figures come from Anonymous 2021, p. 103, the latter come from a survey of more than 1,500 respondents conducted by the Chinese University of Hong Kong, summarised in Xie 2020.

91 Anonymous 2021, p. 103.

education levels tending to be more supportive of the movement.'[92] Similarly, despite majority cross-class support for the movement throughout the city, in one citywide survey conducted in August of 2020, those who described their own socioeconomic position as lying within the 'middle strata' were slightly more supportive, with a total of 63 percent either supporting or strongly supporting the protests, compared to 61 percent of those in the 'upper-middle' or 'upper strata' (a single category in the data) and 57 percent who described themselves as in the 'lower-middle' or 'lowest' strata (also a single category). Outright opposition to the movement was strongest (27 percent) among those who placed themselves in the highest socioeconomic categories.[93]

Given such widespread, cross-class support for the uprising, the crackdown was equally expansive. As of 5 August 2019, there had only been 420 arrests. That number had doubled by the end of the month (to 883 by 27 August) and then gradually increased throughout September and October. By 16 October, a total of 2,363 protestors had been arrested. But the biggest increase came in November, with the mass arrests made during the first two days of the Siege of PolyU contributing a large portion of this. After the police sweep on 18 November, a total of 4,491 protestors had been arrested. After campus had been cleared and other crackdowns conducted across the city, the number increased to 5,890. From there, it trickled upward, surpassing 7,000 by the end of January 2020. By February and March, public demonstrations all but ceased in the face of tightening pandemic controls. But arrests continued at only a slightly slower rate, surpassing 8,000 by the beginning of May, 9,000 by June and 10,000 by September, after which point the pace slowed but did not entirely cease.[94]

By the summer of 2022, the best available records show that somewhere between 10,279 and 10,499 protestors had been arrested and, according to the Security Bureau, 1,754 of these arrestees were less than 18 years old.[95] By the beginning of that year, 2,944 had been charged and 1,171 had gone to trial (635 on charges of riot), with 870 convicted, 788 sentenced, and 620 of these given sentences that included some form of incarceration. Most of those con-

92 Anonymous 2021, p. 105.

93 Xie 2020.

94 Kong Tsung-gan 15 February 2022 'Arrests and trials of Hong Kong protesters and opposition leaders', *Medium*. https://kongtsunggan.medium.com/arrests-and-trials-of-hong-kong-protesters-and-opposition-leaders-2144f5d6895b

95 Ho, Kelly 27 October 2022 'Almost 3,000 people, including 57 minors, prosecuted so far over 2019 Hong Kong protests', *Hong Kong Free Press*. https://hongkongfp.com/2022/10/27/almost-3000-people-including-517-minors-prosecuted-so-far-over-2019-hong-kong-protests/

victed had been charged with crimes such as unlawful assembly, possession of offensive weapons, riot, assault on an officer, or charges related to property damage. For those who were incarcerated, sentences ranged from a few days to over a decade. On average, however, most sentences were in the range of three months to a year and a half, with another cluster of more serious cases averaging three to four years. Only a handful were sentenced to five years or more.[96]

But most of these numbers refer to civil and criminal cases prosecuted through the conventional legal system. The passage of the National Security Law in the summer of 2020 also saw the emergence of distinct policing, judicial, and carceral standards to be applied in certain cases, allowing arrests to be conducted by specialised national security police and trials led by a small panel of handpicked judges, without a jury present and often with strict limits on what information would be made public or whether it could be reported on in the media. By the beginning of 2023, a total of 243 had been arrested on charges covered by either the National Security Law or the colonial-era sedition ordinance (tried in a similar fashion) and 149 of these individuals had been charged, with most accused of subversion or sedition.[97] In general, the sentences for such cases are much more substantial, with 'severe' cases given a mandatory minimum of five years.

National security charges have been the preferred method deployed against civil society organisations and pro-movement media outlets – either as a threat to force their disbandment, or as a means to seize their materials and charge their leadership – as well as leading figures in the movement, including the 47 democrats originally charged with subversion for conducting the unofficial primary (several of whom later turned witness for the prosecution), the board members of the Hong Kong Alliance, and the leaders of the HKCTU. The majority of those arrested in national security cases were civil society leaders of some type, with the single largest group composed of democrats who had formerly held seats in the LegCo or district councils, though those working at media outlets constituted a second large group, and lawyers a third.[98] Similarly, pandemic measures were also used in a punitive fashion to target pro-movement

96 Kong 2022.

97 HKFP 6 March 2023 'Explainer: Hong Kong's national security crackdown – month 32', *Hong Kong Free Press*. https://hongkongfp.com/2023/03/06/explainer-hong-kongs-national-security-crackdown-month-32/

98 Mok, Lea 30 June 2022 '2 years of Hong Kong's national security law – explained in data', *Hong Kong Free Press*. https://hongkongfp.com/2022/06/30/2-years-of-hong-kongs-national-security-law-explained-in-data/

institutions and arrest those attempting to hold demonstrations. Though these charges were usually more minor, they worked alongside new national security legislation to subdue any prospect of revived political mobilisation and to constrain the space for political discourse.

Such measures helped to prevent a resurgence of protests while also isolating the millions who had participated in the uprising from one another. This not only prevented any new political force from taking practical shape but also hindered the collective process of reflection that often follows from such events and (by putting participants in ongoing communication with one another) plays a crucial role in the development of political subjectivity. Further organising and analysis was only able to take place at a distance, conducted largely within the Hong Kong diaspora. And this diaspora grew substantially. According to a 2021 survey, an enormous 42 percent of the population reported their intention to emigrate at some point.[99] Realistically, most would never have the resources. Those with greater means were able to escape the crackdown at far higher rates, leaving lower-class supporters of the movement at the mercy of the government. The result was still substantial. In 2020 some 89,200 people left the city, growing to 113,000 in 2021, and then declining slightly to around 60,000 in 2022.[100] The trend was large enough to turn the city's population growth negative.

Meanwhile, the hoped-for salvation of sanctions and other forms of Western intervention have proved underwhelming. While all the wealthy anglophone countries instituted new visa schemes to assist outmigrants, stronger economic measures were more minimal. Likely the most significant of these has been the decision made by the US to cease 'treating Hong Kong as a separate entity from mainland China in trade, investment, and visas,' with the US State Department nullifying the city's long-standing exemption from the US export control regime.[101] But this has largely meant that the city is now treated in much the same way as the mainland, which is by no means closed to global markets. Though explicit sanctions were applied to a small handful of top officials, the impact was ultimately minimal. Similarly, most of the trade restrictions that were applied were in sectors that had been discussed as potential targets long

99 Hong Kong Institute of Asia-Pacific Studies 2021 'Survey Findings on Views about Emigration from Hong Kong', *The Chinese University of Hong Kong*. http://www.hkiaps.cuhk.edu.hk/wd/ni/20211020-110804_1.pdf

100 Yiu, William 16 February 2023 'Hong Kong's population drops for 3rd straight year, while city posts net outflow of 60,000 residents in 2022,' *South China Morning Post*. https://www.scmp.com/news/hong-kong/society/article/3210429/hong-kong-emigration-wave-net-outflow-60000-residents-2022-marking-09-cent-population-drop-3rd

101 Hung 2022b, p. 207.

before the protests began and would have almost certainly been implemented regardless of events in Hong Kong. In the end, mutual destruction proved to be less than mutual.[102]

9 Necropolis

The Hong Kong protests also illustrate important lessons about both the general nature of the state within capitalist society and the specific process of state formation within China. As Tronti emphasises, state capacity develops only in response to the threat posed by the proletariat. There was therefore absolutely nothing uniquely authoritarian about the repression that played out in Hong Kong. In fact, in the same span of years, many of the exact same features seen in the Hong Kong crackdown were mirrored within the liberal democracies of the wealthy countries both immediately before (as in France in 2018) and immediately after (as in the US in 2020). Similarly, the National Security Law itself was modelled in part on well-established precedents set by anti-terrorism legislation such as the US Patriot Act, with the creation of new national security institutions and new surveillance and censorship capacities following institutional standards set by agencies such as the Department of Homeland Security and the National Security Agency. If anything, these were measures intended to catch up to prevailing international standards, rather than depart from them. Given the central role played by Hong Kong in both the global financial system and the day-to-day functioning of the planetary factory, this local response to an uprising that threatened to destabilise a central node in the global financial system was, in effect, the Hong Kong government acting – at the behest of the Chinese ruling class – as a direct manifestation of the total social capital and thereby ensuring the stable reproduction of capitalist society at the planetary scale.

102 In fact, the city's prospects as a financial hub were essentially unchanged in the aftermath of the protests. Similarly, its export trade, though declining slightly with the pandemic, reached record highs in the early 2020s. While US politicians made an enormous amount of noise about cracking down on Hong Kong – which no doubt encouraged the pan-democrats eagerly licking their boots – the business interests in control of these politicians' campaign funds had other ideas. Though surveys conducted by the American Chamber of Commerce among its membership initially found businesses skeptical of the city's prospects, by 2023 a majority had therefore returned to cautious optimism, with most already doing business in the city planning to stay for the near future (Leung, Kanis, and Soo, Zen 28 April 2023 'Hong Kong's economy is recovering, but its freedoms are not', *AP News*. https://apnews.com/article/hong-kong-reopening-recovery-nsl-f4cb0cdf2ce415ad3056bf88fdfbb250).

At the more specific level of Chinese state formation and the relationship of Hong Kong to ascendant financial and industrial interests in places like Beijing and Shenzhen, the crackdown represented not the power-hungry overreaching of an unaccountable autocracy, but instead an extension of the state building project already underway on the mainland, driven by a complex and often conflictual negotiation of interests between different domestic factions of capital and their affiliates within the local, provincial, and central bureaucracies. Though this project is often attributed to Xi Jinping, it is essentially a continuation of the long-running modernisation of 'consultative' governance already visible in the fiscal and institutional reforms earlier implemented by Zhu Rongji and refined during the Hu and Wen years.[103] The ultimate aim has always been the establishment of the baseline systems of property and contract law, macroeconomic governance standards, and efficient chains of command and clear divisions of authority necessary for capitalist production to take place in the future. In other words, rather than an authoritarian abnormality, the centralisation and standardisation of state power within China is essentially a project of liberalisation, much like the Federalist project of the early US. Perhaps the most salient lesson is simply that the political and civil liberties enshrined by the pan-democrats are ultimately ancillary to the affirmation of liberal economic forms encoded in the property system. After all, whenever social unrest threatens accumulation in any country in any part of the world, these political liberties immediately evaporate in the name of preserving stability and order.

In part, then, the crackdown was conducted to ensure that the city would be able to continue in its role as a finance and logistics entrepot serving international capital, the old guard of Hong Kong capitalists, and the new guard of capitalists from the mainland. But, since the interests of each of these factions are not entirely aligned, the repression also became one of the many forms taken by the supply chain struggles pitting the subordinate blocs of capital in China against the established industrial powers. Rather than a conflict between an authoritarian dictatorship and the liberal world order, the crackdown and subsequent realignment of local governance with mainland standards represents a clash between the mythos of a decaying but still potent liberalism descended from the aging American empire and the ascendant force of a locally vital but still globally weak and nominally 'socialist' liberalism rooted in the new, consultative bourgeois order being constructed in China. At the same time, Hong Kong also serves as a sort of political-economic canary in the coalmine, evoking

103 Chuang 2022.

the very forms of social anomie that Wang Huning witnessed in a deindustrialised America and which Industrial Party thinkers anxiously warn against as one potential future for deindustrialising cities on the mainland. The speed and ruthlessness of the crackdown was, in part, attributable to these precise anxieties, with the city also serving as a cautionary tale demonstrating the state's repressive capacity.

Ultimately, though, if the deployment of bourgeois power demonstrates relatively clear lessons, the sudden eruption of proletarian power offers only foreboding intuitions, as murky as the seething of black-clad limbs glimpsed behind a fog of tear gas. At a very general level, we can argue that the 2019 uprising in Hong Kong is maybe the most condensed expression of both the immense insurrectionary potential of 'post-industrial' existence and the immediate limits faced by any insurrection confined to thoroughly deindustrialised urban territories. For this very reason, it also demonstrates the initial or baseline probability distribution of political subjectivity most likely to take shape in areas where productive subjectivity has been particularly degraded through deindustrialisation. At the same time, however, it shows how these probabilities can be rapidly modified through the practical advance of political struggle, the limits of which will begin to pose increasingly concrete tactical questions to participants facing the basic constraints of their physical environment. In this sense, the retroactive image of a movement dominated by localists demanding autonomy and increasingly-revanchist liberals struggling to restore a fading American order ultimately fails to capture the real scale of events. Though these forces crafted the core symbols of the movement and, on these grounds, often sought to speak for it, sigils are given their power not by the sorcerers who etch them but by the occult forces pushing up against the fabric of the sensible. The meme is only given force through the momentum of the historical party.

In this fashion, localist sigils were soon overloaded with a destructive magic that spilled far beyond their intended function. Chaos poured into the songs and the banners and the yellow helmets drifting like sparks throughout the cityscape until liberal norms were dissolved in nihilistic vigour, and the practical logic of independence gave way to the ecstatic despair of *laam chau*. Full of memetic potential, the occult power of the insurrection even corroded its own borders, seeding struggles far afield with new tactics and points of inspiration. In the summer of the subsequent year, I would see literal memes describing equipment and battle tactics originally used in Hong Kong translated and distributed among rioters in the US. Many of these illustrated common tools and pieces of clothing to bring to a protest, while others diagrammed the roles played by different groups of protestors in sustaining 'frontliner' battles against

the police. This process of syncretic tactical evolution would also be witnessed in Chile, Ecuador, Thailand, Indonesia, and elsewhere.[104] Repressed in one location, the party of anarchy rises in another.

But the limits were equally salient. In fact, Hong Kong offers maybe the grimmest example of the more general predicament that those attempting to build communist power face within any given insurrection in the world today, at a moment when history has only just been reborn and lies in its vulnerable infancy. At the largest scale, we can of course identify the influence of 'structural' forces operating behind what appear to be purely subjective limits – the post-industrial character of the city, for example, is an artifact of long-run changes in the technical composition of production and the geography of finance and industry – but structure also engenders subjectivity at a similarly structural scale. Whether speaking of productive knowledge or political awareness, subjectivity is itself a social substance neither confinable nor even identifiable within the individual mind. It is held together only through the collective mesh of relationships that we have with one another and with the world around us. And this is precisely why these sigils were able to traverse the social substrate so rapidly.

After all, sigils are essentially sub-linguistic. For Bonanno, one of the crucial divides between the included and excluded is the imposition of a linguistic barrier due to deskilling. The excluded are made to subsist on a 'reduced language' that has replaced 'books and newspapers with images, colours and music,' and which remains 'modest and has absolutely elementary code to supply to the excluded so that they can use the computer terminals.'[105] Even when the included become disillusioned, breaking free of the 'teutonic castle' and seeking to organise among the excluded through interventions across civil society, they find those outside deaf to their carefully-crafted discursive appeals. Bonanno then offers a prediction that, in retrospect, can only appear prophetic:

> In the future there will be more and more of these situations of subversive riots that are irrational and unmotivated … we shall have to work towards instruments in a revolutionary and insurrectional vein that can be read by the excluded. … Now that the owners and dispensers of the capacity to rationalise have cut communication, we cannot construct an alternative … We can simply use the same instruments (images, sounds, etc.) in such

104 Chuang 2020.
105 Bonanno 1988, p. 15; p. 21.

> a way as to transmit concepts capable of contributing towards turning situations of riot into insurrection.[106]

The memetic sigil is, of course, just such an instrument, operating beneath language and therefore capable of spreading through social mimesis.

Subjectivity is self-reflexive, with political awareness spiralling in on itself to continually transform its own foundations as political actors transform the practical questions posed in the course of struggle. Because of this, the initial distribution of probable forms of political agency conditioned by productive knowledge and experience, though shaped by various structural forces, can undergo relatively rapid transformations in periods of open social conflict. These transformations then set the stage for the slower development and refinement of new forms of political subjectivity in the aftermath. In more concrete terms: the uprising demonstrates the particular limits of a politics that remains confined to the postindustrial core of the metropolis, not only unable to break the glass floor into the productive sphere but even unwilling to constrict the commercial and logistical flow of commodities pouring out of the territorial complexes that lie at the heart of the planetary factory.

At the same time, the rapid shifts in the practical potential of the insurrection also hint that such limits are hardly unbreakable. The upwelling of the historical party opens the field of 'competitive control' through which more definite forms of power can be built. Though the demiurge seems to be an eldritch entity composed of clashing structural forces, gargantuan and distant, it is ultimately our lives that animate it. Our actions therefore create spirals in its body, tearing against the status quo flow of work and wage that ensures its integrity. As more of these spirals dance together, their collective torsion can rip through the basic substance of society, opening wounds where new sociotechnical practices can germinate, at first saprotrophic – thriving in the decomposition of the body, repurposing dead capital to new use – and then slowly evolving their own autotrophic capacities as a new social metabolism becomes possible after and through the systematic destruction of capitalism. While it is not possible to escape hellworld, it can always be ripped apart by the very social forces that constitute it, of which we are all a part.

Nonetheless, given the long eclipse from which the communist movement is now emerging, we naturally find that almost every feature of our historical inheritance and economic environment seems to predispose the most organisationally advanced of these uprisings toward a loosely liberal-populist politics

106 Bonanno 1988, pp. 23–4.

resembling more the petty-bourgeois uprisings of Europe in 1848 than the proletarian insurrections of the century that followed. Upon closer inspection, however, this resemblance proves to be a farcical facsimile reenacted on the political stage but lacking the substance or even the minimal program of these precursors. Instead, we remain largely in the era of the shapeless rabble, fundamentally apolitical even when cloaked in the shifting and easily discarded tatters of past revolutions. Peer behind the curtain of the play and one finds only an abyss – nothing but the pure, nihilistic rejection of the present world as it exists, expressed initially in whatever alienated terms that world has been presented to participants (in the case of Hong Kong, through the lens of Cold War geopolitics), but ultimately irreducible to these terms, as each political reenactor passes offstage with their signs and their slogans and their little lists of demands to be dissolved back into the seething void, hungry and angry and bottomless. At root, this is the same pit of vigorous, mad hopelessness that lies behind the pyrrhic suicides of the lonely truck drivers, and all those other desolate people fucked over one too many times. But, in this case, the suicidal germ is made contagious, allowing it to mutate into a collective nihilism capable of burning more than the suffering flesh. We can imagine Jin Deqing's suicide note scrawled in angry graffiti on some Hong Kong thoroughfare as protestors hurl Molotov cocktails and shoot police officers with crossbows fired from the PolyU barricades: 'be angry, be mad, live your life well.'

The far-right describes this striving void as a transcendent and purifying power that lies 'beyond left and right,' in some hyperpolitical space beyond the ideological spectrum. But there is no salvific order – no natural nation, no true community, no saving spirit, no unsullied tradition – nothing capable of descending from outside or above to shatter politics-as-usual. Instead, we might more accurately say that we lie *beneath* left and right rather than beyond it. Or perhaps *before* left and right: in the antepolitical space that precedes true partisanship. The historical party surges up spectral against the skin of the sensible without yet piercing through. This upward pressure generates certain contours of struggle within the landscape of class and conflict, even if it has so far failed to create a rift clearly dividing society into warring positions. Rather than a land of living politics, then, we find ourselves trapped in the necropolis. Without the illumination of any shared language, partisanship becomes a matter of probabilities. With no scission there are no clear sides and politics is a game of winding paths rather than a war fought by two clearly defined companies grappling back and forth across an established front of combat.

In fighting forward through the city of the dead, fidelity to the eruptive motion of the historical party is a guessing game, treading dim antepolitical contours traced across the desolation of a largely apolitical terrain. In essence,

then, communists in the present moment are faced with an impossible choice. It goes without saying that fidelity to the historical party requires active and intensive participation in eruptive events.[107] But to do so is to fail again and again. To be thrown into jail, into exile and excommunication, even to be slandered by supposed allies for sullying oneself with the suspicious amorphousness of the yellow vest or yellow helmet – since those trapped in the rotting corpse of the left can only see a latent fascism in any politics that prioritises action over program, which is to say in any *possible* politics at all. Nonetheless, fidelity requires unceasing experimentation and an unwavering engagement with the world, in all its failings. The political terrain must be sounded out, our palms to the paving stones feeling for the seismic shudder of the stirring force beneath.

Hong Kong thereby illustrates with brutal clarity the misery of the communist. There is no choice, no noble cause, no strategy. There is no good side to take and yet we wield insufficient force to make our own. Despite the power of the uprising, there was never anything even remotely resembling a path to victory. Even if every demand had been met and the central government shaken into acquiescence, the result would have been nothing more than an alternate alignment of bourgeois power. In fact, had the suffrage been won or localist policies pursued, the result would have only deepened the entire series of divisions that have long served to sever the city's political practice from that of the mainland, even while its prosperity would continue to be built on value siphoned from workers across the border. After all, despite the old democratic hope in a liberal revolution toppling the central government, universal suffrage was never designed to actually be universal – the factory workers across the border were never included in the plan. Both the pan-democratic and localist programs began from the presumption that Hong Kong retain its exceptional status as a 'special' region not fully integrated with the mainland. But integration was already a *de facto* economic reality. Thus, 'Hong Konger' is a duplicitous identity, disguising a privileged position within planetary production – the ability

107 It is easy enough to call oneself a communist, a socialist, an anarchist and to act out the role on the internet or within microscopic social circles or activist projects, and then to exhibit the most despicable cowardice when faced with the emergence of actual social unrest. Conflictual and violent uprisings therefore also serve to draw those who are willing to learn from struggle on the ground and who hope to exert a real, if minimal, political force through action. This distinguishes those for whom communism is a 'theory' or a 'philosophy' from those attempting to build some modicum of communist power in the world of substance (however hopeless this prospect might seem). Perhaps one of the most important functions of riots and insurrections, then, is their ruthless threshing and winnowing of 'the left,' sorting communists from cowards.

to profit from production across the border without suffering its externalities – under the mask of cultural distinction. By reaffirming this division, the insurrection was effectively quarantined within its post-industrial prison, prevented from taking on a universalist character or orienting toward truly emancipatory goals.

Ironically, history may prove that the most progressive features of the insurrection were visible not in the supposedly noble demands of civil society – for democracy, human rights, freedom of expression or any of the other smiling masks periodically pasted over the grotesque reality of imperial power – nor in the aspirational nationalism of the localists, but instead in the shattering of civil society and the liquidation of any prospect for independence. By forcing political integration under the command structure of the central state, encouraging further migration from the mainland (today essentially the only counterflow to emigration), pushing for an expansion of Mandarin usage, sponsoring mandatory national tours for certain employees, enhancing economic ties in the face of rising sanctions, and doubling down on themes of patriotism and national belonging, the Chinese state ensures that any future politics in Hong Kong will no longer be so easily quarantined. Even more important, however, is the way that the crackdown decisively dissolved the puerile mythos of civil society, demonstrating the utter bankruptcy of any belief in the rule of law, due process, freedom of speech, or any of the other supposed 'rights' enjoyed by the populace. In other words, it unveiled in no uncertain terms that those in Hong Kong live under the same dictatorship of capital that prevails not only on the mainland but also – as many in the Hong Kong diaspora are now discovering – throughout the liberal democracies of the wealthy world as well. With civil society dead, politics proper again becomes possible. The kings of hell may have emerged from their court of darkness to assert their power, but the spectre of communism cannot be excised from the necropolis. It still seethes just under the surface of every alleyway, a mirror image of the cold flow of capital pouring through the financial towers above.

10 Anteparty

Since both the uprising and in its aftermath remain within the same antepolitical terrain, those seeking to act in fidelity to the historical party seem condemned to an interminable hopelessness. Beneath left and right, we have only the *act*. Only courage – here the localists were right, unambiguously – kindled and crushed and rekindled again and again in the wasteland. Communists have no choice but to engage with such uprisings, contributing to their

tactical advances and grappling with our dimly defined enemies through the fog of competitive control despite their strength and our own weakness. But, in such a context, it is difficult to imagine what, exactly, small groups of communists might be able to do. How can power be built from such a minority position? Of course we can agitate, opposing the flag-wavers and the racists and denouncing the civil society liberals shaking hands with right-wing Congressmen. And, of course, our actions should challenge the seemingly natural borders of various subsistence struggles, seeking to push beyond the scope of immediate interests and existing institutions and toward sustainable, substantial and scalable forms of decommodification. Yet this brings us directly back to our initial problem, since our own limited power seems to constrain us to advocating for minimal forms of theft and survival – practices such as looting, squatting, mutual aid, guerrilla gardening, and other microscopic genres of grift and piracy – that are not only parasitic on commodity society, rather than antagonistic it, but also essentially useless as a means to solve or exceed any but the most minor of subsistence struggles (since they are neither sustainable nor scalable).

Building power through action therefore remains the necessary precursor to any question of how that power might best be deployed or which practices are best suited to decommodification. Procrastinating about the precise political content of our actions rather than their practical effect (and ability to amplify our own further capacity to act) quickly becomes a form of paralysis. In Hong Kong, this paralysis is, in part, what allowed the far right to occupy the movement's tactical edge so early and so decisively. And this tactical edge is the most important factor in an antepolitical scenario. While such a claim appears to revive certain questionable elements of the classical vanguardist dogma – in which the movement can only advance through the essentially external intervention of a disciplined and uniquely enlightened cadre possessing a more advanced consciousness than the average proletarian – those who occupy the tactical edge of the movement in this case serve as a purely practical vanguard, rather than one endowed with any special insight. The oath to action is, in fact, counterposed to the programmatic interventions of the enlightened vanguard and is perhaps best understood as something like the decomposition of the very notion that such an external agent can exist at all. It is, in other words, opposed to the both the naïve idea that the party intervenes in the class from outside and the even more questionable notion that 'horizontal' and 'leaderless' forms of self-organisation will arise organically (read: magically) from the practicalities of the struggle itself.

Every movement generates a tactical edge that then becomes the most important theatre within the more general field of 'competitive control.' These

frontlines then open up a reflexive space in which new forms of political intuition are formed, and these intuitions then become the foundation for the potential construction of something like a political 'consciousness' in the traditional sense. As Rodrigo Nunes emphasises, political organisation is unavoidable and cannot be reduced to the colloquial polarity between the 'vertical' and 'horizontal.' At the same time, there also always exists a forward edge propelling any given struggle in some direction. In antepolitical conditions, something like the sigil necessarily arises to serve this function: 'Where there are no previously existing decision-making procedures or structures to coordinate action, let alone formally appointed or recognised leaders, the only way a new collective conduct can emerge is through the action of one or more initiating nodes (nucleation).' There is therefore no getting around the basic function of the vanguard and the question of leadership:

> at its most fundamental, to lead means nothing more than *to be followed*. That is, to orient attention and action in a certain direction; to introduce a polarization in the environment that was not there before; to produce a modulation of collective behaviour that propagates across a group, a network or an ecology as it is adopted and/or adapted by others, triggering other transformations as it moves along.[108]

And the immediate goal of communists is to 'orient attention and action' in the 'certain direction' of decommodification, building power and laying the groundwork for the longer-term project of communist construction.

Intent and consciousness obviously play a role here, insofar as there exists a minority of communists who have a specific goal in mind. They are self-aware to a different degree than others, but they are not bringing this awareness in from the outside so much as expressing the struggle's own awareness of itself. And, for this reason, their intervention cannot be primarily discursive or, in Bonnano's terms, 'illuministic.' Any change in consciousness that follows from this intervention must be an after-effect of the practical intensification of the struggle itself. Even while often rational and thoroughly planned-out, then, the basic form of engagement is something closer to a form of mysticism, seeking to manifest its thought in certain ceremonial motions capable of triggering the same awakening in others without seeking to 'communicate' any doctrine. Bonanno describes this as the deployment of an 'informal' strategy of organisation, defined as 'groups of comrades who come together with precise objectives, on

108 Nunes 2021, pp. 180–81.

the basis of affinity, and contribute to creating mass structures which set themselves intermediate aims, while constructing the minimal conditions for transforming situations of simple riot into those of insurrection.'[109] And, although he explicitly designates this as the 'end of the party,' it is in fact a precise description of how formal parties operate in their infantile and adolescent phases.

But what sort of concrete actions can even be taken when the right seems to have already succeeded in leading each tactical advance? To view the question from this angle is, however, to concede too much to the programmatic framework of the social movement or even the force-on-force paradigm of the military theorist. The politics of action operates neither in the discursive sphere of agitation and argument nor in the simplistic wargame of armed militants, but instead across the antepolitical terrain of the necropolis, where seemingly *apolitical* practices can suddenly take on an outsized tactical potency that then sees new actors shape the ongoing composition of political subjectivity.[110] It is therefore possible to tip the scales at any stage. As Bonanno stresses, this does not downplay the importance of intentional organisation but instead enhances it: 'When riots break out we should not be there as *visitors* to a spectacular event … We must be there as the realisers of a project that has been examined and gone into in detail beforehand.'[111] The exact tactics used will of course be entirely dependent on the context. But the rudimentary discipline of communications, mobilisation, and the channelling of resources are all obvious necessities for being able to operate at the tactical level in the first place. The curse of the communist is precisely this: fidelity is measured by the courage to act even when the odds are, as always, stacked against us. We must strike out in the dark. More than this, we must see the darkness of mass nihilism as a form of hope. After all, the very amorphousness of the necropolis and the subsequent unpre-

109 Bonanno 1988, p. 13.

110 Wohlleben again offers a good summary: 'Since there are few preliminaries, prerequisites, or preconditions, memes allow individuals to move alongside one another while preserving their own respective reasons for fighting, thereby inviting each of us to trust in our own singular evaluation of the situation. This has the great advantage of allowing memetic movements to harness and leverage the antepolitical forms of life in which each of us already participate: think of the hooligans and ultras who fought in Turkey's Gezi Park uprising, the mutual aid networks and autonomous hubs that fed into frontliner formations, or the motorcycle clubs and sideshow drivers whose revving engines became a permanent sensory feature of the George Floyd uprising. When conflicts kick off, these antepolitical lifeforms suddenly become potentiated in new ways, they bend, criss-cross and weave together like so many shards of light through the kaleidoscope of the event, adding fuel to the fire.' (Wohlleben, Adrian 16 May 2021 'Memes Without End', *Ill Will*, 16 May 2021. https://illwill.com/memes-without-end#ref5)

111 Bonnano 1988, p. 25.

dictability of political upheavals guarantees that any given roll of the dice can reset the entire field of probability.

In the longer run, however, the individual uprising is not what matters. It is only through practice that we build our strength, remaining attuned to the seething force of the historical party pressing up from below. The question then becomes not only how we build our power within any given political event, but also how we retain and refine it between these eruptions of political potential. We practice a morbid, masochistic magic, casting our small gestures out into the dark. Alone so long, many of us fall into a special madness. Some become obsessed with increasingly esoteric spellcraft, convincing themselves that correct 'analysis' will reveal the correct strategy. These sorcerers lock themselves into their clouded towers where they study the ancient texts and elaborate star-charts of econometrics, releasing periodic proclamations to dwindling devotees from a distance. Drifting further from the world below, their minds grow dull and hands soft, each of their new stratagems more hyperbolic and less substantial. In the end, they are eaten by the mist like a stone gnawed to nothing under the slow flow of moss and dew.

Others become illusionists, summoning up chimerical apparitions of the world they want to see. The most minor matters of survival become the fuel for their fantasies – the donated pizzas and hastily constructed shanties of the occupation become communism in miniature, every interpersonal interaction pregnant with the weight of a new world – and eventually they may even decamp for the forest, seeking a commune never to be found. In the end they dissolve into wind and dust, billowing after the ever-receding mirage. Others still venture into darker, more violent magics, convinced that if action is all we have then more forceful action equates to more fruitful results. These warlocks grow increasingly enamoured with their own activity. They are obsessed with the power of small groups of 'militants,' bemoaning the lack of 'organization' and imagining that, if only there were more like them, things would be different. They splinter into their sects. They grow masochistic, distinguishing themselves through the praise of self-flagellation. Increasingly desperate when history refuses to stir to their call, they strike the atonal surface of politics with greater and greater ferocity. Eventually, they may even imagine that they alone can break through the veil to draw up the spectral party seething beneath. This only isolates them further. Their actions become adventurist and terroristic. In the end, the caustic substance of their politics cremates them from the inside out.

In such conditions, true communist practice is an art of humility, the ability to fail with grace and to fail better next time. Rather than the sorcerer, a better image of communist practice is perhaps the druid, attuned to rituals of falling

leaves, shedding skin, and the shifting of the myriad forms – these rhythmic magics drawing up the newly born from the newly dead through the endless spiral of rot and rebirth. Without any clear political coordinates, we can only proceed by dead reckoning. And this requires an ecumenical and experimental dexterity better attuned to the blurry, probabilistic contours of the antepolitical terrain. It is a process of pathfinding, more than adherence to a programmatic line. At every stage, there is a threat of becoming lost in the choking wilderness, our fidelity to the communist project eroded through pragmatic compromise and the many bitter realities that attend a world devoid of virtue. The formal parties that emerge from each uprising slowly die off and ossify, prioritising their own survival and jealously defending their small terrain of projects and campaigns. Even the practical orientation of the oath proves to be a curse, offering flexibility in the heat of any given uprising only for the same pragmatism to freeze us in place when the upwelling wanes and the darkness closes in again.

But each new eruption of the historical party lights our position anew, however briefly. We see where we have rooted ourselves and we have the chance to reorient. Writ large, it becomes a weary dance in the dark, desperately gripping the hands of whoever is still with us as each slips from the other in their very striving to never let go. Eventually, we may even find ourselves whirling alone, growing cold, calling out for others and hearing only the frail echo of our own despair. We learn to survive in the wilderness, even if we sacrifice something deep and holy. But eventually the spectre stirs again. And over time it stirs with greater force. The ground fissures and the flames rise in their hollows, alive. After all, communism is invariant. The material conditions of capitalist society will always generate that same occult force pressing up from below. We always find one another again, as the smoke of the burning necropolis rises to blot out the neon sun. Even after death, our own efforts are literally resurrected in the event, hands reaching through time forever, incandescent. We dance together through the firelight in the trees. Maybe our footfalls drum into the earth like a shower of sparks falling from some great machine being broken open like an egg. And maybe the great drumming is itself a ritual – an old one, perhaps, that summons powers older still.

CHAPTER 8

The Great God Development

The late Warring States philosopher Xunzi argued that virtue is neither inborn nor individual but instead an accumulation of acts spanning generations, linked through the artifice of ritual practice (禮) tended by sage rulers. For Xunzi, ritual is simultaneously an instrument wielded by people and the very tool that sculpts them. Thus, virtue can bloom into a grander justice through this ever-changing process of ethical accumulation, constituting a synthetic moral order that runs from the informal realms of familial life and customary practice to the formal realm of statecraft.[1] This is made possible because ritual propriety is not simply a matter of cultivating rarefied personal virtue or ethical purity, but is instead a means of sculpting human social practice to accord with material limits. Ritual is seen as a way of 'nurturing' or 'nourishing' human desire through the orderly (and allegedly meritocratic) distribution of inherently limited material resources. In Xunzi's own words, the ancient sage-kings had established the system of ritual 'in order to divide things among people, to nurture their desires, and to satisfy their seeking. They caused desires never to exhaust material goods, and material goods never to be depleted by desires, so that the two support each other and prosper.'[2]

The two are also locked in a process of continual and mutual transformation, which itself is founded on the basic plasticity of the embodied mind – visible in the ability of habit and custom to both sculpt subjective intent and be sculpted by it. Because of this chain of reflexivity, Xunzi says: 'With ritual, all things can change yet not bring chaos.'[3] But this is a material process, rather than a merely intellectual or moral one. In fact, given the changing nature of a distributional system that must both refine itself through the accumulation of artifice and attune itself to constantly changing natural conditions and to its own reflexive impact on human desires themselves, we might even think of Xunzi's concept of ritual as among the first recorded theories of the thing we think of today as 'development.'[4] After all, is not the central promise of development precisely that 'all things can change yet not bring chaos?'

1 This reading of Xunzi is derived from the work of Tao Jiang (2021) and Brook Ziporyn (2012).
2 Lines 19.1–19.12 of the Xunzi, from: Hutton 2014.
3 Hutton 2014, lines 19.136.
4 Technically, Xunzi is appropriating and expanding on themes already visible in Mozi.

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Xunzi is also possibly the first philosopher to identify what later thinkers, drawing from Marx, would refer to as a 'social logic,' since ritual is a certain pattern of imperatives that emerges from specific human practices and then inveighs back onto the day-to-day conduct of individuals within the social system.[5] But Xunzi remains, at root, a philosopher of the elite. The distributional system of ritual is tended through the proper division of roles in accord with natural hierarchies of merit, beginning from the minor social forms of family and custom and continuing through to the myriad functions taken on by the state bureaucracy. His emphasis on the material underpinnings of this ritual system emphasises the constraints of scarcity to justify this hierarchy. The 'nourishment' of the population via ritual practice is, fundamentally, guided by the sage intervention of enlightened rulers, much as development today is seen as a matter of careful statecraft and the conscious selection of proper policies by governing elites – proper ritual policies now being those that accord with the social logic of capital (attuned to a territory's particular amenities), with 'growth' serving as their measure.

Thus, ritual is essentially a system of sacrifice to a social logic that promises (and, in fact, delivers) nourishment of the population, with the very (allegedly meritocratic) administration of this nourishment ultimately disguising elite power. While Xunzi sees this as the accumulation of a sum of virtue that ultimately exceeds the moral prowess of any individual sage-king, for communists the terms are reversed. Just as Camatte argues that humanity is now a 'ritual of capital,' we can suggest that this vast ritual system – the concrete social logic – that composes capitalist society is instead a peculiar accumulation of evil, and that this is an emergent evil that exists in excess of individual greed or lust for power. Its evil character is confirmed in the various forms of excess – gluttony, greed, fraud – that it encourages among individuals, in its destructive disregard for the environment, and, even more so, in its perpetuation of the arbitrary domination of humans by other humans via exploitation, expropriation, and the day-to-day inequities coded into the system, which Xunzi mistakes for a meritocratic hierarchy. Capitalism is therefore a vast ritual of domination disguised as a system of nourishment.

5 For a general overview of the concept of social logic, see: Mau 2022, pp. 37–47; or, for an even more focused account: Mattick 2021.

1 Temple in the Grains

In the video stand the silhouettes of five men on a dirt field, one with golden hair, all holding golden shovels, digging, clapping, shaking hands. Behind them is an enormous American flag draped between the arms of excavators raised like arches in a vaulted chamber. The newscaster voiceover narrates a story of green fields and rust belt revival, explaining that the project has been given the codename 'Flying Eagle.' In the distance there is a razor-thin line of trees, cutting a green edge into the horizon. But you can see that no one quite believes it. Beyond the flag lays nothing but the unending flatness of the Midwest. Beneath the thin soil the same ancient evil awaits its exhumation. The performance is, in a sense, ritualistic. And each scripted action is, in its very artificiality, weighed down by a sense of loss, borne as priest bears his vestments. The affect is interwoven like a glitch between the pixels, flat light falling on the dirt and dying there, shadow pooling in the palms between shaking hands. Perhaps the most important features of the ritual are the ceremonial appellations: US president Donald Trump, Foxconn founder Terry Gou, Wisconsin governor Scott Walker, speaker of the house Paul Ryan, and of course a generic symbol of labor, Christopher Murdock, given the dubious honor of being the first employee of Foxconn in Wisconsin. Once, great beasts had walked this land and humans had hunted them and piled their bones in gargantuan mounds. Now, the soil of the mighty prairie is little more than dust at the feet of these suited creatures calling themselves men. The shovels cut into it, their golden paint flaking into the hard-packed dirt.

Ritual is, again, the best description. The scene is a scripted event layered atop an equally scripted series of business deals, all woven into the larger mythos of industrial revival and wedged within the grand love-hate drama of the US and China – in which Taiwan has always played the awkward third. But it is also something more: the priests of the political system, the economic viziers that lay behind them, and of course a symbolic representative of the "common man," coming together on a forsaken plain on the edge of what was once the very heart of the planetary factory to perform a golden sacrifice. This pathetic benediction is intended to draw the Great God Development back from its Eastward arc, powerful cardinals of capital kneeling in the dirt to beg that its eminence might again inhabit its rusted temple in the grains. In the end, the prayer seems to have had no effect.

The agreement was, ostensibly, for Foxconn to invest several billion (initially 10, then 7 billion) dollars in a factory complex in the exurb of Mount Pleasant, Wisconsin, just southwest of Milwaukee, where it also purchased a downtown office building to help manage the project – originally proposed as an advanced

LCD manufacturing site that would bring panel production closer to the final market for high-end televisions. Gou claimed that the facility might employ as many as fifty thousand workers, though this was later scaled back substantially to thirteen thousand (for reference, the total population of the town is just under thirty thousand). It was a flagship deal for the Trump administration, for Governor Scott Walker, and for the Republican Party more generally, with the government coordinating what would have been the largest tax incentive deal ever given to a foreign firm in US history. This included a total of three billion in subsidies, wide-ranging environmental review exemptions, a series of infrastructural investments by the local government, and the threat of eminent domain to clear smaller landowners from the 20 million-square-foot site.

But the mythos of manufacturing soon ran up against the hard material of the market. The factory was, supposedly, set to produce either cutting edge gen 10.5 LCD panels or standard gen six panels, or possibly both. As the world leader in electronics manufacturing, Foxconn had more than enough upstream and downstream supply chain linkages to make the project technically feasible. Meanwhile, though large for the US, the facility itself would by no means be the biggest of Foxconn's business parks. It was planning similarly sized ones in Vietnam and India in the same years and had just recently gotten its massive facility in Zhengzhou operating at full capacity. Not coincidentally, all these locations had also seen a similar degree of collusion between the firm and various levels of government. In India, Foxconn had worked closely with the Modi administration and with Adani Group, the country's largest industrial interest, to open a series of new plants in the latter 2010s, a trend that would only accelerate in the 2020s.[6] In China, the Zhengzhou complex received more than 1.5 billion USD in subsidies from the local government of the lower-tier landlocked city, which also built out its road system and constructed additional power capacity to support the factory.[7] To this day, both the city and provincial government help to recruit workers from Henan's rural hinterland to work at the site, especially during seasonal booms whenever a new iPhone model is set to be released, or during the grain harvest, when labour becomes scarce – the industrial seasons of the market now thoroughly interwoven with the ancient agrarian rhythm. The Wisconsin plan seems to have been explicitly modelled on these preced-

6 Aulakh, Gulveen 8 September 2023 'Foxconn backs India's role in electronics manufacturing', *mint*. https://www.livemint.com/companies/news/foxconn-backs-india-s-role-in-electronics-manufacturing-11694113387413.html

7 Barboza, David, 29 December 2016 'How China Built "iPhone City" With Billions in Perks for Apple's Partner', *The New York Times*. https://www.nytimes.com/2016/12/29/technology/apple-iphone-china-foxconn.html

ents, essentially emulating the sort of developmental incentives long common in mainland China and now increasingly seen in other emergent industrial centres.

However, despite their similarities as flatland provinces known mostly for their exports of grain and other agricultural goods, Wisconsin is no Henan. After the ground was broken in 2018, the deal almost immediately stalled. Journalist Josh Dzieza, who has carefully documented the entire saga, describes the conditions in Foxconn's Milwaukee offices, which were supposed to be overseeing the project:

> … new recruits arriving at the 1960s office building … were surprised to discover they had to provide their own office supplies … they brought their laptops from home and scavenged pencils left behind by the building's previous tenants. They listened to the cries of co-workers trapped in elevators that often broke, noted the water that occasionally leaked from the ceiling, and wondered when the building would be transformed into the gleaming North American headquarters an executive had promised.[8]

In other words, rather than stepping into the gleaming new future they had been promised, these workers were literally trapped in a leaking ruin from the city's industrial past.

Meanwhile, in Mount Pleasant, the company constructed little more than the empty shell of a warehouse that was a fraction of the size of what had been announced, alongside a strange dome-like structure seemingly built for show. Almost none of the promised jobs materialised and those that did were 'less than real: many of them held by people with nothing to do, hired so the company could reach the number required for it to get tax subsidy payments,' which it also ultimately failed to receive.[9] Though the firm was not successful in meeting any of the hurdles necessary to secure the promised $3 billion payout, state and local governments had already spent nearly half a billion on land and infrastructure in order to attract Foxconn to the area in the first place.

The basic constraints faced by the project were very simple: at the level of manufacturing, LCD panels are subject to the same harsh cost-competitiveness as basically every other product line in consumer electronics. Over the course of the 2010s, intense competition within the lower and middle rungs of the supply chain – populated, again, by subcontractors operating mostly in mainland

8 Dzieza, Josh 19 October 2020 'The 8th Wonder of the World', *The Verge*. https://www.theverge.com/c/21507966/foxconn-empty-factories-wisconsin-jobs-loophole-trump

9 Ibid.

China – saw increasing overcapacity that quickly led to plummeting prices. While the complex nature of the then-next-gen 10.5 LCD panels had initially insulated them from this decline, there was no reason to assume that these television screens would not ultimately succumb to the same price pressures that all generations of LCD panels before them had experienced. And Foxconn quite obviously should have been able to forecast this trend.

In a way, the project was almost like a joke gone too far. Terry Gou was a businessman who, like Trump, was well known for overpromising and underdelivering. He loved to announce investments that would never happen. This serves as a useful publicity manoeuvre. But it also it helps to fish for lucrative deals and acts as a bludgeon against local governments in locations where Foxconn is actually investing or is already in operation, threatening them with the prospect of relocation to areas offering greater subsidies and tax incentives. These 'state visit projects' are common in the industry, for obvious reasons: 'Officials get a ribbon-cutting photo op, the company gets political goodwill, and everyone understands that the details of the contract are just an opening bid by a company that will ultimately do whatever makes economic sense.'[10] But when Gou's characteristic exaggeration met Trump's penchant for hyperbole, the two gave birth to a positive feedback loop of overblown promises. By the time ground was broken, they were unironically referring to the factory complex as the 'Silicon Valley of the Midwest' and the 'eighth wonder of the world.'[11]

But the trouble was not just with LCD panels. The greater difficulty was instead that there seemed to be very few lucrative lines of production left, at least in Wisconsin. The area had long ago been stripped of anything worth taking, leaving little more than a flat expanse. The forests had been deforested, the plains tilled and their soil spent, the railroads had been laid and then forsaken, industries had bloomed and wilted, the seasons had changed. After the LCD panel project was abandoned, 'Foxconn would spend the next two years jumping from idea to idea – fish farms, exporting ice cream, storing boats – in an increasingly surreal search for some way to generate money from a doomed project.'[12] For the 113 or so 'employees' that the firm had been able to hire by the end of 2018, the experience was as much a comedy of errors as it was a kind of psychological horror. Dzieza describes the conditions reported by interviewees from the Milwaukee offices:

10 Ibid.
11 Ibid.
12 Ibid.

> Many just sat in their cubicles watching Netflix and playing games on their phones … Multiple employees recall seeing people cry in the office. 'The best is when you're in the elevator with somebody and they just scream out of nowhere,' said an employee who experienced this several times … 'Imagine being in a job where you don't really know if it's real or not. Or you know it's not real, but you don't know it's not real … I think all of us were on the verge of a major breakdown.'[13]

Eventually, the company pivoted toward increasingly eccentric and inscrutable proposals. Central among these were a series of 'innovation centres,' described by Foxconn executive Alan Yeung (point person on the project) with a strange slurry of empty buzzwords: the centres would 'catalyze cutting-edge solutions,' and build 'a vibrant AI 8K+5G ecosystem.' Behind the babble, the plan for the centres – insofar as any could be said to exist – appeared to be little more than conventional coworking spaces, essentially copy-pasting the business plan of WeWork.[14] More than a year after being announced, most of the so-called innovation centres in cities such as Eau Claire remained empty or had failed to materialise entirely.[15]

The search for profitable lines of business soon reached comical proportions. After the coworking plan fizzled,

> employees began convening to discuss literally any other idea to make money. They searched for things in Wisconsin they could export to China: cosmetics, designer handbags, ice cream, carp. Yeung asked them to draw up a plan for building an aquaponic fish farm … They briefly explored doing something with esports, maybe sponsoring a gaming team that could use the empty innovation centres.[16]

Yeung eventually gravitated toward a plan to make nearby Racine, WI, an old manufacturing town hit particularly hard by deindustrialisation, into a 'smart city,' promising a 5G network and autonomous electric vehicles that could

13 Ibid.

14 Ironically, in roughly the same time frame, WeWork would become infamous for a failed IPO due to its vastly exaggerated valuation on a business model that appeared to simply not be profitable, with the company announcing plans to file for bankruptcy by the early 2020s.

15 Dzieza, Josh, and Patel, Nilay 12 April 2020 'Foxconn's buildings in Wisconsin are still empty, one year later', *The Verge*. https://www.theverge.com/2020/4/12/21217060/foxconn-wisconsin-innovation-centres-empty-buildings

16 Dzieza 2020.

patrol for crime and shuttle workers to the campus in Mount Pleasant. But all that came of the plan was Foxconn's purchase of the electric golf carts meant to be retrofitted (how, exactly, remained undetermined) into self-driving cars:

> One employee described them as 'the biggest pieces of shit,' like something 'bought off Wish.com.' Unable to make them autonomous, Foxconn put them in storage … bored employees would come down from the Milwaukee headquarters to race the carts around the empty building, until the batteries finally died.[17]

Among the final plans, formulated after a last-ditch meeting with the Trump administration, was to have the company simply become a vendor for the federal agency that procures products for government use. But even this failed to pan out because, despite having a purchase guarantee in place, Foxconn simply could not turn enough of a profit on the deal.

At least a part of the saga finally came to an end in 2023, when Foxconn happily sold the land on which the LCD factory was originally meant to sit (315 acres of the 1,200-acre total) to Microsoft. The deal partially reimbursed Foxconn for its initial loss and helped to pay down the debt accrued by the local government, which had been scrambling to find anyone willing to use the land for anything whatsoever. Microsoft plans to build a data centre on the site by the middle of the decade – an industry that has become common in distant rural areas with cheap land and abundant supplies of water for cooling the massive server farms. Data centres are, however, notorious for providing very little in the way of employment. Most jobs associated with the project (an estimated 2,000–3,000) will be temporary construction work.[18] Rather than engines of re-industrialisation, data centres are essentially postindustrial artifacts: squat, windowless cubes siphoning water and electricity from the surrounding area, fenced off from public access, their labyrinthine interiors lit only by the sparse passage of technicians moving through the endless depth of rack rows like

17 Ibid.

18 In 2024, Microsoft announced an expansion of the project to include a 'manufacturing-focused artificial intelligence co-innovation lab,' and some sort of AI training program, alongside a partnership with a local energy company to build a large solar project to help power the new data centre. Though pumping more money into the project (raising the total investment from 1 billion to 3.3 billion), none of the newly-announced expansions will generate substantial employment. (Thibault, Matthew 20 May 2024 'Microsoft plows $3.3B into data centre at former Foxconn site', *Construction Dive*. https://www.constructiondive.com/news/microsoft-data-centre-wisconsin-foxconn/716520/)

censer-swinging priests blessing some scriptorium. The darkness is otherwise populated only by the servers, each itself a similarly featureless cube.

Such spaces are perhaps something close to the Platonic ideal of fixed capital, a mute obelisk of dead labour woven in on itself in dense layers, needing only the thinnest drip of work to be set in motion siphoning profit from a landscape emptied of labourers, emptied of crops, emptied even of humming insects. In the end, the old evil is drawn up from the beneath the bloody plains and shaped into an arcane monument, inscrutable to anyone passing by in that wasteland looking for work. After the golden shovel had made the cut, the men stood for the cameras and then shrugged and walked away, leaving five small holes in the dirt.

2 The Evil Here

In the aftermath of the Foxconn project, it was easy to blame the failure on the 'corruption' of those involved: Gou, Trump, and the coterie of Midwestern Republicans playing rust belt populists. The entire ordeal did, after all, seem to be a classic case of what is commonly called 'corporate welfare,' where public funds are used to subsidise private business. And the spectacular failure of the deal contributed in no small part to Scott Walker's loss in the subsequent gubernatorial election. Under scrutiny from the new Democratic governor, Foxconn would then begin blame its failures on a poor business climate stoked by a hostile state administration. But all these narratives assume that there is some other, more earnest market in which business ought to take place, either unsullied by corrupt politicians or unobstructed by public authority. In other words, narratives of 'corruption' or 'government overreach' operate within a framework that accepts the alienated appearance of capitalist society at face value, taking for granted the existence of a harsh divide between 'state' and 'market,' with the former an external and artificial power representing the general interests of the national population and the latter the intrinsic and organic mechanism for mediating the private interests of civil society. 'Domination' is seen as an artifact of history, as the overstepping of the political into the economic, or as the product of a more general breakdown in these spheres of activity, but not as an intrinsic characteristic of either. Within such a framework, the close relationship between the bourgeoisie and the bureaucracy can only appear as a form of unfair collusion. But this is, very simply, the way that business is done. The state itself is an emanation of class power and the deployment of bureaucratic authority in the service of capital is therefore the rule, rather than the exception.

Even the most rudimentary glance at history demonstrates that various forms of 'corruption' have not been exceptional features of capitalist development but instead universal ones. The lineage of every modern bourgeoisie traces back to some ancestral alliance of merchants, warlords, bureaucrats, and slavers. Similarly, direct state intervention has always accompanied (has, in fact, fuelled) periods of rapid market growth and has tended to be most important not where the market has 'failed' but instead where competitive pressures have been so powerful that they have confined local elites to subsidiary sectors, limiting marketisation and inducing forms of underdevelopment that can only be broken by the state-led construction of market infrastructure. In fact, what came to be known as 'development' is, at its most fundamental level, little more than the elaboration within and between states of a conflict between established elites and their subordinates over power within the market. The features that we most associate with successful development – elimination of extreme poverty, lower mortality, increased education – are therefore only ancillary outcomes of the fraternal warfare between the owners of industry, who are nonetheless united in their more fundamental war against those who have been dispossessed of all but their ability to labour. But this also means that, in any given region, both the basic subsistence needs and the more general advancement of the working class are held hostage by elite interests. Since the population depends on wages for survival, its prospects are, in fact, contingent on the success of the country's industries in the fraternal battle between factions of capital. Meanwhile, because the technical upgrading of production also requires workers of a certain skill level, success in competition is premised on the development of more advanced infrastructures of social reproduction, including national education and healthcare systems and the provision of increasingly expensive residential infrastructures such as electrified housing, sewer systems, and fibreoptic networks.

Inverting Xunzi, we can say that these 'nourishing' features of development are both dependent upon and help to structure the accumulation of individual evils into an expansive ritual logic (the law of value) tended by and for the benefit of elites. Thus, what we know of today as the 'developmental state' is hardly modern. It is instead the necessary form that has always been adopted by any loosely aligned fraction of capitalists who find themselves in a similarly weak market position and seek to strengthen it. Though maybe less mercenary, the tactics used by Foxconn in Wisconsin were in no way dissimilar from those used elsewhere: local authorities building out infrastructure to invite investment, higher-level dealings with provincial and central government authorities to secure the guarantee of large-scale subsidies, payoffs for local landholders and threats of eviction for the stubborn holdouts. What was unique about the

case was, instead, its apparent backwardness. Rather than a local government in some country further down the imperial hierarchy scrambling to attract investment from middle-rung contract manufacturers serving lead monopsonies, this was a small town in the world's wealthiest country struggling to attract investment from a Taiwanese contract manufacturer to open a factory producing relatively higher-end components (LCD panels) for a mid-to-low-end segment (LCD displays) of the consumer electronics market dominated by South Korean (Samsung, LG), Taiwanese (AU Optronics), and mainland Chinese (BOE, TCL, Hisense, Xiaomi) firms, with companies from the wealthiest countries (Dutch firm Phillips, Japanese firms Sony, Sharp, and Toshiba, or US firm Vizio) commanding only marginal shares of the market through their control over higher-end product lines.

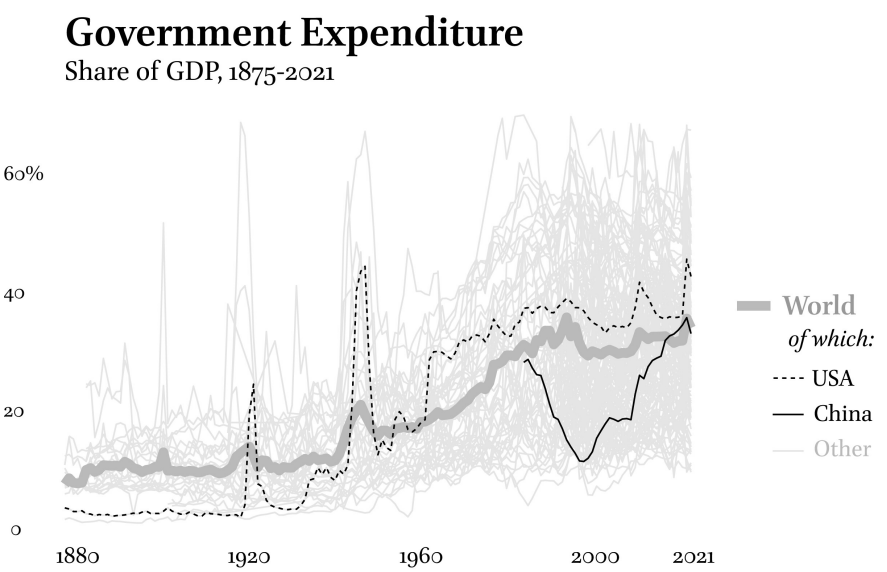
Ultimately, the optimistic employment projections put forward by the proponents of the Foxconn project were only possible because LCD panel assembly, though heavily mechanised, nonetheless requires large amounts of labour when conducted at scale. But, just like in other consumer electronics lines, individual factories require access to cheap labour and proximity to both upstream component suppliers and downstream assembly plants. The deal therefore fell through not because it was uniquely 'corrupt,' but because there was simply no way for it to be profitable. Again, what was bizarre about the saga of Foxconn in Wisconsin was not that it attempted to mobilise fairly standard features of the 'developmental state' to secure large-scale investment in manufacturing, but that it did so in an area where industry had already come and gone and profits had shifted into other avenues. In other words, the Trumpist gambit – to be continued and scaled up by Biden – was to mobilise developmentalist themes usually reserved for poorer, newly-industrialising countries within a postindustrial context. The alluring theme of this drama was clear: to draw the Great God Development back to the bloody plains of its birth.

Developmentalism has again become an attractive discourse even in wealthy countries precisely because deindustrialisation has led to stagnant growth and widening inequality, casting most proletarians out into a vast surplus population where life is defined (in the richest settings) by crumbling welfare measures and dead-end low-wage gig and service jobs, or (in the poorest ones) by black market subsistence, abject impoverishment, detention, deportation and death. Meanwhile, though the offshoring of industry helped to temporarily reinforce the position of lead firms from the wealthy countries, it also gave once-marginal companies the ability to grow into large-scale producers in their own right. This created new competitors in major industrial markets (South Korean automakers, for example) and gave emerging supply chain monopolies (such as Foxconn itself) the ability to challenge the monopsonic

power of leading brands, financiers, and IP brokers. It is no coincidence, then, that every US administration from Obama onwards has increasingly positioned itself against a 'China threat' posed in geopolitical terms but quite clearly industrial at root. Although state intervention is perhaps most visible at these lower levels of development, it does not fade as the process progresses. Instead, the state sublates into the background, becoming, if anything, more pervasive and more central to production over time. The growing centrality of the state is therefore a secular trend visible in essentially every measure of the government's financial weight within the overall economy.

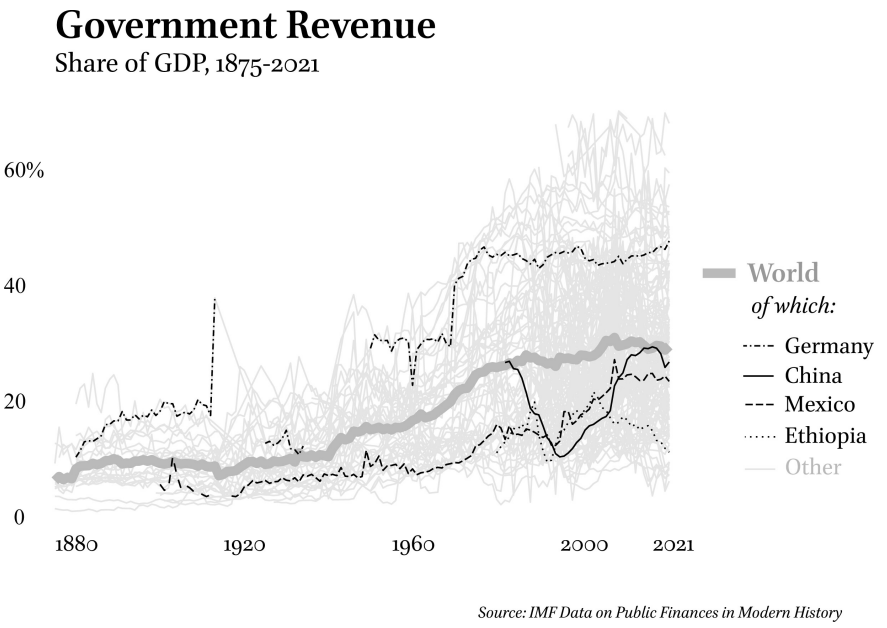
The implications are similarly clear. As Mattick argues: 'Government is no longer merely the political arm of the capitalist class. Its economic interests are so intertwined with those of the capitalist class that government-policy and corporation-policy are one and the same.'[19] Anecdotally, these conditions are visible in the more general character of leading US industrial firms like Boeing, which is so dependent on government support that, in 2022, it announced plans to finally relocate its headquarters to Arlington, Virginia, just outside Washington D.C., to be closer to its key customers. Not coincidentally, the same area is also host to the country's largest and fastest growing cluster of data centres, sitting at an early nexus in the physical infrastructure undergirding the internet (the MAE-East IXP, and now Equinix Exchange sites in Ashburn and Vienna), itself born out of state-subsidised military-industrial research in Arlington. But it is at the empirical level that the trend is most clearly visible. Figures 21 and 22 plot global averages of government revenue as a share of GDP, against which individual national cases can be compared. Two things are immediately apparent: first, an inexorable upward trend (spiking and dipping with the flow of wars and crises) that begins, in full, at the start of the twentieth century; and, second, the fact that the supposedly heavy-handed developmentalists such as China actually see far less of their GDP committed to government use compared to supposedly *laissez-faire* leaders such as the US (the largest figures, of course, are those of the EU countries that still retain some remnants of the welfare

19 Mattick 1969, p. 264. Since the increasing prominence of the state becomes more apparent over time, the process also tends to continually generate new myths of the state taking over or displacing the market. The most famous (and the one against which Mattick was posing his argument) is likely the 'monopoly capitalism' theory of Paul Baran and Paul Sweezy that became popular in the postwar period. More recently, however, Robert Brenner and Dylan Riley fall into much the same error, describing the present as a period in which 'raw political power, rather than productive investment, is the key determinant of the rate of return,' a condition they describe as 'political capitalism' (Brenner and Riley 2022).



Source: IMF Data on Public Finances in Modern History

FIGURE 21 Government Expenditure, Share of GDP, 1875–2021



Source: IMF Data on Public Finances in Modern History

FIGURE 22 Government Revenue, Share of GDP, 1875–2021

state).[20] In fact, China's initial developmental boom in the 1990s was accompanied by plummeting government spending, since this period also saw the dismantling of the socialist-era safety net and rapid liberalisation of services.

Meanwhile, the trend in other export centres like Mexico, though rarely held up as a case study in developmentalism, has been more or less identical to that seen in China since the turn of the century. On the other hand, 'emerging economies' that have been intentionally and aggressively pursuing the developmental state model, such as Ethiopia, have actually seen the relative weight of government spending within the economy decline. Though at first this might seem to be contradictory, it actually makes perfect sense when we remember that the defining feature of capitalist development is the necessary expansion of private investment. Thus, when GDP growth is the fastest – as in Ethiopia since roughly 2004, and in China from the early 1990s to the mid-2000s – even rapid increases in government revenue and spending will compose a smaller relative share of GDP. When growth slows, however, the relative weight of government financing will rise. This then creates the illusion that unprofitable state spending and rent-seeking are pressuring or 'crowding out' the private market, when the causal relationship is in fact the opposite: slowing growth in the 'private' sector forces more extensive 'public' intervention to both prevent a catastrophic crash and facilitate further rounds of accumulation by subsidising the basic technical 'innovations' around which new industrial clusters can take shape.

What appears as the backwards transplantation of developmentalism into post-industrial conditions in the Foxconn in Wisconsin case is therefore the foremost expression of intensifying competition between factions of capital armed with and dependent upon massive state infrastructures that are already intricately interwoven into the basic fabric of the global economy. Stagnant growth, diminished outlets for profitable investment, and inflated debt bubbles only incentivise further government interventions – now necessary not only to prop up ailing firms or prevent recurrent crises from snowballing into depressions, but also to reinforce and sharpen the competitive edge of domestic firms faced with increasingly zero-sum competition in the global market. As political commentator Jamie Merchant explains:

20 The general upward trend is also marked by at least two distinct plateaus: the first an early stage in the nineteenth century during which government revenues and expenditures hovered around 10–20 percent in the European core and between 1–5 percent in the agrarian peripheries, and the second a more recent period of flat or very slow growth from the 1990s onward with government revenues and expenditures in most countries somewhere in the range of 20–40 percent of GDP.

> In a world in which growth is scarce and ideas scarcer, industrial policy … returns as a strategy that capitalist countries are forced to adopt to defeat one another on the shifting stage of global competition. Its return to fashion in official discourse signals a distinctive feature of that competition in the current moment: a constantly expanding footprint of national states in both domestic and international corporate economies. As economic growth dries up, states are compelled to abandon the usual platitudes about free trade, openly calling for the kinds of aggressively nationalist, beggar-thy-neighbour policies that the capitalist world was supposed to have left behind. The different national forms this takes – Bidenomics in the US, Germany's Industrial Strategy 2030, China's Made in China 2025, India's MII (Make in India) initiative, and so on – are all particular instances of a single, structural transformation of the world economy into a fragmented state-capitalist hellscape.[21]

And this hellscape is not simply competitive but also cooperative, structured by inherently hierarchical planetary supply chains in which individual firms are loosely yoked together as 'national' blocs due to their shared positions relative to lead firms and their shared dependence on delimited land, labour, and currency markets sustained by specific state institutions.

Stretched out in time, that same hierarchy also becomes the history of development itself. On the one hand, this is a simple story in which successful development is emulated by later-developers, its key moments punctuated by crises that then help to induce systemic shifts toward new technical systems. On the other, it is also a history in which long-run tendencies such as mechanisation narrow the range for any simple repetition of developmental practices piloted in the past. Though the machinery of market and state are sharpened in the process, the more general progress of industrialisation – as indexed by its geographical extension and technical intensification – therefore makes catch-up development more difficult over time, as even rudimentary manufacturing competitiveness comes to require increasing investments in infrastructure, advanced machinery, and reproductive institutions capable of producing a workforce of adequate skill and discipline, all of which is only made possible by larger and larger infusions of capital, well beyond the scope of what can be mobilised by local elites. Thus, each new generation of subordinate elites is forced to gather more state resources and deploy them more deftly, to intensify and streamline the appropriation of value from all available amenities (from

21 Merchant 2023.

labour, of course, but also from any possible ground rents), and to grovel more enthusiastically (cutting labour costs, offering every imaginable tax-break and environmental write-off) at the feet of the more powerful factions of capital that administer access to the mainsprings of value via their control over the market, not to mention the global financial system itself.

3 Steam and Sail

Tracing the slow oscillation of these long waves of technical change and material transformation will therefore allow us to see the secular growth in state power over time and the perennial collusion between bureaucracy and bourgeoisie that spans all seasons of production. At the very advent of capitalist machinofacture in Britain, state policy in the service of capital helped to suppress proletarian unrest and respond to economic crisis. In so doing, it also shaped the most rudimentary energetic and technological forms taken by early industrialisation and laid the groundwork for the emerging geography of the world market in manufactures. And, although these decisions were ultimately intended to bolster the power of British firms against an incendiary working class, such choices would also enable the later emergence of foreign industrial competitors able to adopt refined versions of the same techno-ecological practices more cheaply, more quickly, and at larger scales. What followed was therefore a chain of developmental states, each modelled on the last and all, as a rule, accusing their imitators of new forms of corruption, collusion, and cronyism that departed from the liberal norm according to which the civic sphere of the bureaucracy ought to remain separate from the private market of the bourgeoisie.

As Tronti emphasizes, class struggle itself is the social engine driving the process. For example, in his account of how and why steam power won out over waterpower in early industrial Britain, Andreas Malm illustrates a series of interwoven causes ultimately tied back to the fundamental drive for control over labour and time in production. In contrast to conventional accounts of the industrial revolution, which presume that steam won out over earlier water mills because coal was a cheaper source of energy, Malm points out that this simply was not the case. The water mill had been the grounds on which the earliest systems of factory production had taken shape in the textile industry, with labour forces drawn from the nearby countryside and forced into necessarily militaristic regimes of production attuned to the inconstant – but essentially cost-free – flow of water, which was dictated by both natural climatic variation and a competitive struggle with other upstream users. Water-powered

mills then enabled a massive expansion in handloom weaving, often based in nearby homes, which gradually drove down the piece-rates paid to weavers until the sector was forced to survive on embezzlement and ultimately mechanised to extinction. But the basic problems with the system were social, rather than technical. Capacity in the watermills could only be effectively expanded through cooperative measures that the private nature of these ventures tended to spurn. When the productivity explosion gave way to a crisis of overproduction in 1825, owners were faced with 'the first structural crisis of industrial capitalism in its country of birth,' beginning a long process (Malm dates it from roughly 1825–48) that would end in the adoption of steam.[22]

But the structural crisis also raised the spectre of revolution. Because of their intensive labour requirements, these early water-based factories burned through labour supplies in the most brutal forms possible, with no limits to the workday, no restrictions on the age of workers, and ruthless dormitory regimes that imprisoned them in place: 'quite literally, hundreds of thousands of workers were being reduced to the bare bones of human existence.'[23] Similarly, dwindling piece-rates strangled the livelihoods of handloom weavers. In essence, one of the first ecological crises posed by the wedging of capitalist social domination within the metabolic gap – and the one most thoroughly studied by Marx, who spends page after page meticulously documenting government records on the matter – involved not so much the destruction of the environment as the slow extermination of the early proletariat through overwork and starvation.

Such conditions had already resulted in aggressive responses well before the crisis broke out, as in the early 1810s when 'hundreds of new frameworks were destroyed in dozens of coordinated, clandestine attacks under the aegis of a mythical leader called "Ned Ludd."' Though these 'Luddites' would later become synonymous with simplistic and violent technophobia, both their goals and tactics were far broader. They 'launched vociferous public protests, sparked chaotic riots, and continually stole from mills,' with their political stance 'also enunciated through voluminous decentralised letter-writing campaigns, which petitioned – sometimes threatened – local industrialists and government bureaucrats, pressing for reforms such as higher minimum wages, cession of child labour, and standards of quality for cloth goods.'[24] Though repression eventually broke the movement, it failed to suppress the basic sentiment. In the aftermath, textile workers began even more focused agitation

22 Malm 2016, p. 59; p. 63.
23 Malm 2016, p. 72.
24 Meuller 2021, p. 10.

for the repeal of the Combination Laws, which had limited workers' ability to organise unions and drove proletarian organisations further underground.[25] Strikes advocating for the legalisation of unions occurred in 1818, 1820, and 1823, accompanied by innumerable petitions from both workers and progressive elites.[26]

Limits on unionisation were finally repealed in 1824, on the very eve of the crisis. The repeal 'was above all an attempt to separate legitimate trades union activity from illegitimate political agitation.'[27] But it instead resulted in a series of even larger strikes that won major wage gains and thereby intensified the decline in profits due to general overcapacity in the sector. Though 1825 saw some of these legal rights rolled back, strikes persisted and 'it happened that the forces of labour launched a militant offensive *just as industrial capital crashed*.'[28] The new wave of strikes that then emerged in the context of the crisis also took on a qualitatively different character:

> Outbreaks of popular insurrection … punctuated the structural crisis. One after the other, they seemed to push Britain towards the brink of all-out revolution: first the Lancashire rising of 1826, then the Swing Riots of 1830, the South Wales rebellion of 1831, the Reform crisis of 1831–2, the general unionism of 1832–4, all succeeded in 1838 by the supreme challenge of Chartism, culminating in the general strike of 1842 – the most critical near-revolutionary movement in the nineteenth century, if not in the entire modern history of Britain.[29]

However, instead of cooperating to better manage the flow of water and labour, the crisis resulted in ruthless competition between mills: 'The logic of property was violently accentuated in the structural crisis, the mill a turf to be defended in a war of all against all within the larger war on labour.'[30] The state therefore stepped in to secure the basic interests of these early capitalists against the incendiary industrial workforce that had taken shape within their firms.

The most important intervention in this period came in the form of the Factory Acts. Though well-meaning legislation had already been passed in favour of the workers, many of these prior laws were similar in kind to the minimum

25 Clarke 1988, p. 60.
26 Malm 2016, p. 61.
27 Clarke 1988, p. 60.
28 Malm 2016, p. 62, italics in original.
29 Ibid.
30 Malm 2016, p. 119.

wage and workers' rights reforms passed by the Chinese state over the course of the 2000s: without any real enforcement mechanisms, they were mostly measures designed to uphold the moral integrity of a government otherwise defined by generally low levels of state capacity. In 1833, however, resources were mobilised for the first time to formulate a new Factory Act with actual enforcement power, as embodied in publicly employed factory inspectors who held far-reaching powers. Not only did 'the institution of a special inspectorate [mark] a qualitative difference from all prior laws,' it was also essentially the beginning of modern economic policy as such, marking the point at which the state first began to address questions of employment and working conditions.[31] In a sense, it was a form of public health intervention similar in kind to later environmental laws, insofar as one of its main goals was to ensure the long-term survival of a labour force otherwise bled dry for short-term gain. Prefiguring subsequent state interventions in the face of later unrest and economic crisis, these regulations were presented as necessary measures made in the general interests of country and industry. Throughout the entire legislative process, however, the workers themselves remained entirely disenfranchised: 'In 1831, 3.8 per cent of the population over the age of 20 were enfranchised, in 1833 the proportion had risen to only 5.9 per cent.'[32]

The laws also served to both unintentionally channel technological change toward the steam engine and tilt the basic geography of industry away from the countryside and toward the cities. At the time, mass production was a largely rural affair in which most work was still performed in households. Thus, 'the crucial constraint was the availability of homeworkers,' and, by both siphoning in labourers from these rural households and increasing the rate and scale of production, the emergence of the watermill factories only worsened the problem.[33] Meanwhile, the mills themselves were locked in place and subject to the whims of the weather. Since new limits were placed on the age and education of workers, the length and regularity of the working day (including bans on excessive overtime and night work), and working conditions, the owners of the water mills were systematically stripped of their ability to fluctuate the time and intensity of work around the uncertain flow of the rivers and streams that served as the prime mover for their spinning machines. Given their more distant rural locations, the new regulations also undercut their ability to hold workers in place through dictatorial methods. Thus, even though 'neither the

31 ibid, pp. 179–80.

32 Clarke 1988, p. 63. The 1832 Reform Bill a year prior had merely extended the vote, previously limited to landed elites, to include capitalists and smaller landowners.

33 Banaji 2020, p. 87.

government nor the inspectors were … in any way *bent on* destroying the water mills' the Factory Acts ultimately induced structural changes that systematically favoured steam mills over water mills nonetheless.[34]

Watermills therefore saw a much higher frequency of fines under the new inspection system than their steam-based counterparts. The likelihood of court action 'rose by *one-third* when the energy came from water' and also led to stronger penalties.[35] Steam mills were subject to the same basic regulatory limits, but they were able to overcome the new constraints on profitability because of their ample access to plentiful sources of cheap urban labour in the cities (without any of the added costs of running heavily disciplined company-town dormitory systems) and, relatedly, their ability to both intensify the amount of work put in by labourers per hour and to roll out new machines that could draw on the more portable and manageable power of coal despite the fact that steam power remained, in purely economic terms, more expensive than water. Thus, the Factory Acts ultimately 'strangled waterpower, first by confiscating the tools used by the masters to manage river fluctuations, and then by prodding them to speed up.'[36] By this time, the British coal industry was already well established and steam engines of one sort or another had existed for nearly 100 years but had been limited largely to simple pumps mostly used in the coal mining sector itself.

In general, the brutal conditions of the extractive industries serve as something of an evolutionary alembic, demonstrating proof of concept and reducing novel techniques down to their most profit-adapted forms. Only afterwards are they taken up at scale by other industries. Thus, as Smil notes, 'coal mining and steam engines reinforced each other's development,' with deeper mines needing stronger pumps and stronger pumps needing deeper mines to produce cheaper fuel.[37] The steam engine was born not in the factory, then, but in the coalfield. And the coalfields were already growing. As early as 1660, 'coal covered more than a third of the country's energy output; by 1700, half.'[38] According to some estimates, coal may have surpassed biomass as the main source of heat in England as early as 1620.[39] But, despite the invention of primitive steam engines, very little of this coal was used for powering such machines throughout the eighteenth century. Instead, it was mainly deployed in the min-

34 Malm 2016, p. 180. Italics in original.
35 Malm 2016, p. 183.
36 Malm 2016, p. 192.
37 Smil 2018, p. 238.
38 Moore 2015, p. 132.
39 Smil 2018, p. 233.

ing sector, as a heating fuel for an increasingly urban population, and in the production of glass, paper, and various chemicals such as soaps and dyes, and, lastly, as coking coal in the production of iron (after the invention of the process in the early 1700s).

This last use was especially important, since iron would soon rank alongside brick as one of the most common anthropic rocks in the built environment of early capitalism. Already, primitive iron production had been among the most important drivers of deforestation in England and Europe throughout the Middle Ages, with the charcoal from clearcut forests deployed to produce the very iron tools used in the felling of these forests and the tilling of the rich soil underneath. As in the case of mining, technical advances and novel forms of labour deployment were largely piloted in rural foundries located near necessary inputs of timber and ore. Initially, the core metallurgical workforce of smiths and miners was itinerant, moving between these ore bodies. Gradually, however, smelting sites were geographically delinked from mines, concentrating the actual metalworking process within the cities. Transport, timber felling, and charcoal production was performed by nearby populations of peasants and, when smelting was delinked from mining and demand for metals began to increase, these rural populations also became crucial sources of labour for the growing mines. Over time, the frontier of metallurgical deforestation moved further afield, as in the shift of the timber products and iron and copper industries from Central Europe to Scandinavia in the 1500s.[40]

The other major driver of deforestation was population growth, which created a similar feedback loop insofar as the clearing of woodland made nutrient rich soil available for the production of food. This then allowed for both extensive peasant settlement (benefiting from a honeymoon period of high soil quality, followed by a steady decline) and the rise of breadbasket production centres in the riparian portions of these deforested areas, as in the Vistula basin in Poland, which fed growing population centres such as Amsterdam.[41] The Dutch ascent had been premised, in part, on the replacement of charcoal with peat, which began to geographically sever the factory's reliance on the forest, allowing for unprecedented concentrations of industrial activity in urban centres. The British pivot to coal only intensified this trend, allowing for a massive concentration of population within cities even in the absence of biomass for heating.

Similarly, coal soon replaced charcoal in iron production. As early as 1770,

40 See: Moore 2015, pp. 182–185.

41 Moore 2010, pp. 188–227.

'coke was used to produce 46% of British iron,' an increase from a mere seven percent in 1750, and 'by 1784, when coke was used in all phases of production, the figure reached 90 percent.'[42] The 1800s would then see a series of refinements in coal blast furnaces, making it 'possible to boost the global pig iron output from only about 800,000 t in 1750 to about 30 Mt in 1900, laying the foundation for the post-1860 development of the modern steel industry and providing the key metal of industrialization.'[43] In the building materials sector, similar advances were made in the application of coal-fired kilns to brickmaking. This would prove crucial for building out the urban environment despite widespread deforestation. But the most important impact was felt within industry itself, where the result of cheap brick and iron was 'the radical cheapening of *fixed* capital at the same time as new machinery was massively deployed.'[44] Overall, the process effectively transmuted the dense carbon energy of coal into the literal iron and brick bedrock of early capitalist society.

In each of these sectors, class conflict had shaped technical changes much as they did within the mills. Part of the benefit of peat and, later, coal production for industry was its ability to undercut labour costs by replacing scarce rural labour pools at distant production sites near timber resources with the abundant (and therefore cheaper) urban labour pool available in and around the city, with cities now linked together by state-backed shipbuilding industries of unprecedented size and scale. For local elites, this initially seemed to undercut the threat of popular revolts taking root among the rural majority. But soon the new sectors would also see novel forms of class conflict emerge, more capable of spanning these early industrial complexes. Sailors were among the first examples of this new working class in formation, leading strike-like mutinies and founding their own breakaway republics.[45] In fact, the very word 'strike' originates in the act of removing the topsails from ships, effectively immobilising them. The term entered the popular lexicon over the course of the 1760s, when a series of work stoppages culminated in the London Strikes of 1768.

The keelmen tasked with carrying coal from shore to ship in Northern England had also led a series of mutinies over the late seventeenth century before evolving into a primitive trade union in the first decades of the eighteenth. Similarly, coal miners led a widespread work stoppage in 1765 and (largely migrant Irish) coal-heavers had engaged in an escalating series of riots and

42 Smil 2018 p. 234; Moore 2015 p. 133.
43 Smil 2018, p. 235.
44 Moore 2015, p. 133.
45 Redike 1998.

strikes since the 1750s – initially seeking to break the undertakers' monopoly over shovels, which they rented to the Irish workers at exorbitant rates. In 1768, the coal-heavers had already led several bloody work stoppages and attacks on undertakers, who had since become something like labour brokers facilitating the breaking of strikes. Later that same year, the sailors struck their sails and stopped work. In response, the undertakers mobilised strikebreakers to unload the ships, and the government called in the navy to oversee the process. A riot broke out, the military intervened, and, in the aftermath, nine coal-heavers were found guilty of murder and hanged.[46] The extension of class conflict to the watermills of the textile sector began shortly thereafter.

Overall, the result of these early strikes and industrial crises was to complete the geographic transition from the 'proto-industry' of 'industrial mass production in the countryside' to the modern standard of urban manufacturing agglomerations.[47] This geographic transition was itself also a technical and energetic shift, as the material exoskeleton of society transitioned from wood and stone to iron and brick, with water- and horsepower gradually replaced as prime movers within industry by steam, and coal displacing water, wood, and peat as the primary energy source. Altogether, these changes enabled a general intensification of production itself, with 'the velocity of the machines in the British cotton mills [increasing] by one-twenty-fourth between 1845 and 1848,' a trend largely driven by the implementation of new (and extremely dangerous) high-pressure steam engines.[48] This then induced an entire series of knock-on changes up the chain of industry, allowing for 'iron, and increasingly steel, tools and machinery [to] be deployed on a gargantuan scale.'[49] In roughly the decade and a half between the mid-1830s and 1850, 'British industry experienced the most concentrated spike in machine demand of the century,' essentially wiping out the old artisanal workshop system in favour of modern machine tools operated by low-waged, unskilled manufacturing workers.[50] Meanwhile, the power of the British state grew alongside, now armed with both economic policy and industry-fattened coffers capable of funding increasingly expansive overseas military ventures.

At the economic level, the destruction of the workshop in favour of the factory also created the conditions necessary to escape from the broader crisis:

46 Feenan, Dermot 23 May 2018 'The Birth of the Strike', *Jacobin*. https://jacobin.com/2018/05/strikes-history-london-sailors-coal-heavers

47 Banaji 2020, p. 87.

48 Malm 2016, p. 191.

49 Moore 2015, p. 133.

50 Malm 2016, p. 198.

> Indeed, the mechanisation of machine production was vitally important for ending the structural crisis: without it, expanding capital accumulation on the basis of machinery simply would not have been possible. Only with the multiplied productivity and certainty of the machine tools could the self-acting mule, the power loom, the cylinder printing machine, the combing machine and, not the least, the steam engine itself be spread over the surface of the British economy. The years after the panic saw *the first general push* to substitute machines for human labour …[51]

The trade boom that followed the crisis then demonstrated maybe the first prototypical case of the state's servile autonomy, since the various administrative and welfare reforms passed during the crisis required that the government sustain its revenues even after the crisis passed. And this, in turn 'ensured that the government had an interest in the expansion of trade that, through customs and excise, provided the primary source of its revenue.'[52]

4 The Global Grid of Iron

The British case not only illustrates the way that state activity channels technological innovation but also how it sculpts the general cartography of territorial development that then takes shape through the implantation of these new technologies across the Earth's crust. While the former is demonstrated by the steam revolution, the latter is better illustrated in the role played by the extension of early logistics infrastructure, visible in the rise of the railways and the replacement of sailing ships with steamships. Crisis again played a crucial role in the process. The slow recovery from the 1825 crash would see overproduction gradually cleared through bankruptcy, market expansion, and the rollout of new machine technologies. The first steamships and railways had already been in operation since the turn of the century, but remained largely small-scale, private, and were often not commercially viable.[53] By the 1830s, however, the opening of public railways and the use of steamships for trans-Atlantic crossings triggered an immense amount of interest in these technologies, coinciding with the slow climb out of the crisis.

The recovery was therefore accompanied by an early railway boom which, though serving a crucial function in extending markets, had by the 1840s turned

51 Ibid. Italics in original.
52 Clarke 1988, p. 78.
53 Smil 2018, p. 240.

into a speculative bubble as shares in railways were traded on the stock exchange. Though the establishment of the Bank of England as the central currency authority in 1844 was intended to prevent the outbreak of new financial crises, the following year saw poor harvests, declining exports, and rising imports, which only pushed more investment into speculative avenues. This bubble then burst in the Panic of 1847, which forced the government to suspend the restrictions that had only recently been placed on the Bank to allow it to step in and serve as lender of last resort. The resulting depression was extremely uneven.[54] Export industries suffered, but the long timeline between initial investment and final completion of railway construction meant that the speculative bubble itself took on an afterlife in ongoing projects that helped to sustain related demand in coal, iron, and engineering industries, creating a miniature commodities bubble similar to the global one stimulated by Chinese infrastructural demand throughout the 2010s.

Thus, the infrastructural nature of the boom also helped to ensure a relatively rapid recovery, albeit one rooted in the very speculative sector that had helped to cause the crash in the first place:

> Although railway products provided a relatively small proportion of the increases in production and trade, there is no doubt that the railways played the pivotal role in breaking through the barriers of overproduction that had regularly halted the traditional export industries in their tracks by opening up export markets, the growth of which closely followed the construction of railways.[55]

Ironically, it was the growth in trade following this infrastructural expansion that would then be seen as the decisive factor in the subsequent Victorian booms, creating the illusion that these were prototypical cases of free market prosperity. The 'coal/steam power nexus' also extended the commodity frontier of British industry, with railways and steamship use expanding even more rapidly in the United States, where they 'facilitated an explosion of internal trade – merchant shipping on rivers in the trans-Appalachian west increased nearly tenfold between 1830 and 1860,' which then gave British mills access to cheap cotton produced by slave labour in the agrarian periphery and to cheapened grain imports, 'first from Ireland and, after the 1846 repeal of the Corn Laws, increasingly from North America.'[56] Thus, the industrial revolution in England

54 Clarke 1988, pp. 79–83.
55 Ibid p. 81.
56 Moore 2015, pp. 135–6.

depended on the agricultural revolution in the American Midwest, with the two linked by the new logistical mesh of steam and iron.

In a way, this was the first period of 'globalization' driven by modern manufacturing, with the volume of international trade growing fivefold between 1840 and 1870 and 'much of this … the work of British commercial firms.'[57] In Moore's words: 'Capitalism as a planetary system became possible through the production of a globe-encircling railroad and steamship network' such that 'planetary work as a whole – nearly all unpaid – was now *potentially* available for conscription into the armies of capital.'[58] But beneath the merchant lay the railroad and behind the coal-black cloud of industry always hides the servile state. This would become undeniable once the agrarian frontier shifted from the US to India and other colonial holdings in the late Victorian period. But it was just as obvious during the earlier boom in so-called 'Free Trade.' As Clarke emphasises:

> domestic railway companies were incorporated by Parliamentary Acts, while the majority of foreign promotions were sponsored by national or local governments, so that political (and, particularly in the case of Indian railways, military) considerations played a more important part than economic factors in determining the pace and location of railway construction as every town sought to secure its place on the railway map while there was considerable scope for fraud and corruption.[59]

This is again a pattern that resembles the Chinese case with a disturbing precision. In fact, it would be repeated *ad infinitum* in subsequent development cycles in new countries, as emerging elites mobilised makeshift land bureaus, militaries, and financial markets to force the violent enclosure of frontiers, reconstruct war-torn regions, and lay the groundwork necessary for markets to take root.

The process also generated new forms of subcontracted corporate organisation that would be used, after the fact, as evidence for the vitality of liberal principles of market governance despite the central role played by the state in their formation. Subcontracting itself first emerged in the canal and road-building sectors where 'unprecedentedly large projects' required not only the use of state financing and organisation but also 'the recruitment and supervision of huge labour forces' that simply could not be overseen by a single lead

57 Banaji 2020, p. 74.
58 Moore 2015, p. 137.
59 Clarke 1988, p. 81.

engineer. The role of construction contractors then took on its modern form in the Victorian railway industry, with 'the large contractors who emerged in the 1830s … seen as successors to those who undertook civil engineering projects in the later eighteenth and early nineteenth centuries …' enabling the construction of both modern cities and logistical mega-projects such as the Suez Canal.[60] The trend was also visible in other infrastructural sectors such as irrigation and dam construction, which induced spillovers into lines such as cotton and textiles similar in kind to those between the railways and the coal and iron industries.[61]

Again, a pattern was established in which each cycle of contraction and expansion would be accompanied by newer, larger, and more complex forms of corporate organisation better able to discipline labour and coordinate production at increased scales in time and place. Nor would this simply be a linear path of rising monopolisation liquidating competitive pressures or 'socializing' industry, since the persistence of class conflict and recurring crises of overproduction would ensure continual pressure on profitability. Monopoly and competition would instead move in unison, increasing their size, scope, and intensity together, as two aspects of the same long-run increase in the social scale of production.

By the middle of the nineteenth century, this scale had grown substantially. In 1847, the three major British railway contractors 'employed almost two per cent of the British labour force, used a tenth of the iron produced for domestic consumption, and were the largest customers of British industry. At their peak, they were the largest single employer in Britain …' and organised their '(all non-union) workers worldwide through [a] system of pyramidal subcontracts.'[62] Eventually, their growing monopoly would even invert their relationship with financers, promoters, and the parliamentary powers that approved such projects. As these contractors moved overseas (namely to Western Europe and the US), they also entered into a range of diverse relationships with host countries and their local blocs of capital, sometimes conducting their projects as fully British-financed ventures, but just as often working under the employ of foreign financiers such as Crédit Mobilier. Similarly, they often received direct support from local governments even as they operated in competition with ascendant groups of French, German, and American firms.

After another crash in the 1850s, British capital then sought to ease these competitive pressures and double down on its own dominance by turning

60 Linder, Mark 1994, p. 28.
61 ibid, pp. 48–49.
62 Linder 1994, p. 37.

toward the periphery, where the railways took on an increasingly colonial function – often now financiers themselves, they were partially compensated in grants of land that lay along the line – and thereby found their interests tied more closely than ever to those of the British state.[63] Employment in the sector only grew, absorbing enormous shares of the waged population in host countries and also becoming increasingly reliant on unfree labour, including that supplied through colonial corvee and, in flagrant violation of British law, through formal systems of slavery in places like Brazil.[64] The role of the state was central to this international expansion, operating at multiple levels and again underscoring Fernand Braudel's well-known claim that 'capitalism only triumphs when it becomes identified with the state, when it *is* the state.'[65]

But the nature of state involvement also signalled its deepening dependence on accumulation. First, various state institutions grew increasingly engaged in the actual planning and even construction process, initially in India and then in other colonial holdings. By the 1870s, the British colonial government in India was able to rely on its own 'departmental system of construction, under which the department of Public Works, employing a thousand civil and Royal Engineers' took on many of the duties of the earlier private monopolies.[66] Second, in contrast to the smaller and more privatised domestic railway projects (which were nonetheless only incorporated through acts of parliament), the foreign promotions usually required the sponsorship of the local government and often took on military functions, ensuring that the political calculus of local power struggles determined the exact shape taken by the final system.[67] This also meant that other governments took on crucial supporting roles, as in the intervention of local, state, and federal institutions in the US boom in streetcar and railway construction, which was one of the major sites for British investment.

Finally, the internationalisation of railway investment had a series of knock-on effects that bolstered Britain's imperial position in general, which then enabled even further expansion throughout the colonial periphery: 'The growth of international trade and investment stimulated the growth of British shipping and of the financial institutions that provided the credit, finance, insurance and means of payment that increasingly made London the finan-

63 Linder 1994, pp. 36–40.
64 Linder 1994, pp. 43–6.
65 Braudel 1977, p. 64.
66 Linder 1994, p. 57.
67 Clarke 1988, p. 82.

cial centre of the world.'[68] Imperial privilege thereby came to be embodied in a growing trade deficit (with industrialising competitors in Europe and the US) made up for by 'invisible exports' embodied in 'Britain's dominance in world shipping, insurance and other commercial services' as well as 'the gigantic surge in British investments overseas' and other mercantile activities overseen by the City of London.[69] But beneath these flows of trade and investment lay the grid of iron, now serving as a concrete manifestation of British capital's hegemony over the global economy as a whole.

However, even while the railways had helped to pull the economy out of its structural crisis, the internationalisation of the sector also spread its speculative character. State guarantees only exacerbated the problem, since they reduced investors' wariness of many projects' inherent unprofitability. Thus, waves of mania in the stock markets were 'consequently followed by successive crashes as railway projects failed to realise the anticipated profits and as foreign governments found themselves unable or unwilling to honour their guarantees.'[70] These cyclical fluctuations then 'communicated themselves to other branches of trade and industry and reverberated through the financial system on an increasingly international scale.'[71] And such crises soon took on an increasingly systemic character, since the entire system of macroeconomic management in place throughout the late nineteenth century 'depended *crucially* on invisible exports and Britain's ability to sustain those in the face of widening trade deficits.'[72]

Nonetheless, as in the 1830s, even the most excessive and speculative investments were not purely 'fictitious' but instead left behind a crust of fixed capital, with the railways that remained (their initial costs often subsequently written off by creditors) helping to weave time and space into the rhythms of the expanding market. In other sectors such as coal, textiles, iron, machine tools, and shipbuilding, overcapacity and overproduction left a similar encrustation of fixed infrastructure, which cheapened rudimentary inputs and thereby helped form the basis for subsequent booms. These strata of dead labour would then serve as the earliest exoskeleton for the planetary factory as it expanded to the first generation of developmental states in places like the US, Germany, and Japan.

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68 Clarke 1988, p. 81.
69 Banaji 2020, p. 76.
70 Clarke 1988, pp. 82.
71 Clarke 1988, pp. 82–83.
72 Banaji 2020, p. 76. Italics in original.

5 The American System

But these encrustations of capital also imposed constraints on subsequent cycles of territorial development, channelling them in particular directions and privileging elites in certain 'late developer' countries over others. The geography of capitalist industry is therefore always 'combined and uneven,' since each new sequence of territorial development is composed of materially different strata of capital laid down at distinct times and literally grounded in place.[73] The modern nation-state emerges, in part, from this inherent tension between motion and fixity built into the very structure of capital. As new infrastructures are implanted into the surface of the Earth, these technical systems not only draw in population and transform the scale, intensity, and character of the local metabolism with nature – visible in a sudden siphoning of more mass into the mesh of manufactures – they also require territorial institutions for defence, administration, and the assertion of local economic needs both within and against the global market. Thus, for geographer Henri Lefebvre, territorial variegation is central to understanding the nature of the state itself. As explained by urban geographer Neil Brenner, Lefebvre demonstrates how the 'spatial logistics' that emerge from this process go on to 'generate a powerful ideological projection – that the state is administering a pregiven "natural space" or a purely formal territorial geometry, devoid of political significance rather than a terrain of violence, enclosure, dispossession, exploitation, and struggle that has been forged through earlier rounds of spatial-logistical intervention.'[74]

Since this variegation is rooted in literal landscapes of fixed capital owned by particular firms who find themselves in competition with other firms owning other, older landscapes of fixed capital, the emergence of a simultaneously cooperative and conflictual hierarchy of states is already implied by the 'combined and uneven' character of territorial development. This hierarchy then takes on its fullest form when an ascendant bloc is able to deploy its power with a certain degree of independence, signalled by its capture-and-creation of a distinct state infrastructure with its own fiscal, financial, and administrative authority grounded in an industrial territory.[75] Thus embodied in the state,

73 The concept of 'combined and uneven development' originally comes from Trotsky but would later be revived within the field of economic geography by figures such as Doreen Massey, Neil Smith, and David Harvey.

74 Brenner 2019, p. 73.

75 This industrial territory always has a divided structure, however, in the sense that it takes on the character of a 'national bloc' with regard to outside interests and, internally, a char-

the discontinuities that arise from territorial and temporal unevenness are then easily inflated to serve as rhetorical weapons in domestic clashes between factions of capital, some of whom serve to benefit from portraying foreign blocs of industrialists as external forces threatening the very foundations of capitalist society or even civilisation as such.

More importantly, since firms controlled by ascendant elites are born into disadvantage and dependency relative to those of the established core – and often only emerge in the first place via acts of war and revolution against that core – they are also able to mobilise a certain moral authority that wields immense ideological power, disguising their own competitive needs in the garb of a more general anti-imperialism that then garners the support of other subsidiary elites similarly repressed by the established interests. In fact, this anti-imperial posture often finds allies among working-class organizations at home and abroad. Domestically, subsidiary elites are able to draw on the reasonable fear of distant rule by foreign corporations and their pet militaries to enforce local labour discipline and even drum up support for sub-imperial campaigns. Abroad, the rising power is easily romanticized by those suffering the direct oppression of the ruling order, since it offers what appears to be the only practical challenge to that order.[76] Ultimately, though, neither the changing structural conditions of social reproduction nor the incidental features that arise in each new cycle of development transform the fundamental laws of value that govern both state and market. New institutional arrangements, new geographic centres, and the emergence of new technologies are all, in the end, adaptive reiterations of those same laws.

It was therefore only with the emergence of second-order industrial zones in places like the US and Germany that the phenomenon of state-led developmentalism and accompanying discourses of 'corruption,' industrial espionage, and illiberal governance came to define the process of industrialisation. For this reason, one of the closest historical precedents for contemporary discourse around 'corruption' and industrialisation in China is in fact the nineteenth century Gilded Age in the US. As sociologist Yuen Yuen Ang argues, the Gilded Age was a period in which local governments were incentivised to compete for

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acter defined by regional differentiation between different zones of accumulation with distinct attributes and densities of industrial implantation, subdividing the national bloc into its own subsidiary factions aligned with different product lines or provinces of production.

76 Perhaps the best-known example is that of W.E.B. Du Bois endorsing the Japanese imperial vision in Asia and even supporting Japan's bloody invasion of China in the 1930s. But the position taken by Du Bois had already become common among Garveyites as early as Japan's 1905 victory against Russia.

investment and, in so doing, made use of much the same methods deployed more recently in the Chinese economic boom, including the financing of new development through leveraged land values (formalised in the land grant system) and all the conventional forms of corruption: 'Bribing legislators, insider trading, political patronage, and so on, were all rampant. And yet America's economy soared for reasons quite similar to China.'[77] Growth remained strong, urban development took spectacular new forms, industrialisation proceeded at a rapid pace, and extensive infrastructural projects such as streetcar systems and national railway network were completed using the most advanced technologies and the most modern systems of public-private finance available at the time.

The US case also echoes the Chinese in the active role taken by the central government in facilitating the development of leading-edge technologies, protecting nascent domestic industries, and mobilising political and financial resources to enhance the competitiveness of American manufactures on the global market:

> The state played from the start a very active role in the growth of American capitalism. Apart from protective tariffs, there was a host of federal, state, and city public works infrastructure projects, and widespread financial aid directly provided to new industries. Legislation in all jurisdictions was lenient on businesses declaring bankruptcy, and harsh on workers resisting exploitation … The courts proved especially important in promoting the conversion of inactive land to developmental use … facilitating the rapid growth of commodity and labour markets, and countering what capitalists saw as the dangerous tendencies of local democracy.[78]

Tracing their history to the very origin of the American political project, over the course of the next century these policies would slowly cohere into what came to be known as the 'American School' or 'American System of Manufacturing.' It was this system that underlay the rapid industrial growth of the Gilded Age.

Though not fully implemented until the nineteenth century, the American System was rooted in the legacy of Federalists such as Alexander Hamilton and the Pennsylvanian political economist Tench Coxe, coauthors of the *Report on Manufactures*. The report was presented to congress in 1791 but only imple-

77 Ang 2020, p. 18.
78 Panitch and Ginden 2012, p. 32.

mented in a piecemeal and ultimately incomplete fashion when the US was forced into a series of embargoes in the lead-up to the war of 1812. The basic theory and strategy of the system was subsequently developed by nineteenth-century politicians and economists such as Henry Clay and Henry Carey. Meanwhile, these manufacturing policies were accompanied by a financial plan that aimed to establish what Hamilton called a 'public credit system,' rooted in government-backed finance, which would 'restore the country's creditworthiness, create a pool of available investment capital, expand the waged labour force, and increase foreign investment and trade.' The two plans were designed to work hand in hand:

> Hamilton emphasized the need to expand the class of waged workers that could be put to work once investments flowed. … Using the vast land holdings as collateral to refinance the Revolutionary War debt closed off the escape of white workers into subsistence farming and instead trapped them in waged labour alongside the growing slave labour force. It was this new expanded waged labour force, which Hamilton proposed should also include women and children, that would be exploited by the financial capital flowing into new investments.[79]

As Treasury Secretary under Washington, Hamilton himself began constructing the outlines of this system, pushing through the establishment of a national bank through which government bonds could be issued, their value 'backed by the new federal power to tax, the sale of vast federal lands, and the immense value of slaves.' The new financial system was reinforced by the 'newly expanded army and navy, federal power to regulate interstate and foreign commerce, issue currency and enforce contracts' enabled by the 'supremacy powers' laid out in Article VI of the US Constitution, which secured the powers of the federal government over those of the states. These powers were justified, in part, due to the threat of 'domestic insurrections.'[80]

At the formal level, even the earliest of these policies already advocated for a form of 'import-substitution industrialization, funded by a national bank and high protectionist tariffs.'[81] But it was at the informal level that the conflictual character of development would be most apparent, with the American System

79 Ovetz, Robert 20 September 2023 'How Hamilton's Financial and Manufacturing Plans Financed the U.S. Empire', *Cosmonaut*. https://cosmonautmag.com/2023/09/how-hamiltons-financial-and-manufacturing-plans-financed-the-us-empire/

80 Ibid.

81 Leung 2021b.

defined in practice by more ruthless tactics such as piracy, smuggling, and espionage, all of which were made necessary by unequal trade policies imposed by the British and designed to keep emergent elites in overseas territories in a dependent position vis a vis the imperial core – in the US case, first as an outright colony and then as a nominally independent but nonetheless peripheral plantation economy specialised in the export of cotton, tobacco, and grain. Just as the channelling of early industry toward steam power would occur only through a protracted period of crisis and class conflict that saw some capitalists lose out to others, so too would the first developmental state emerge out of violent struggles between warring factions of capital over access to early manufacturing technologies, played out through both market competition and force of arms. As these struggles sharpened, they also induced further territorial expansion, with newer and more intensive manufacturing centres requiring larger-scale inputs of foodstuffs and raw materials and more extensive markets. The willingness of the early American state to wage wars of extermination across its continental frontier therefore helped to tilt capitalist society's centre of gravity Westward – a process that developmental states in Europe simply could not emulate at the same scale, even within the colonies.[82]

But the engine of this expansion was always industrial. As the earliest forms of mechanised production took root in the British textile industry, British capitalists worked with the government to outlaw the export of both machinery and designs, restrict access to factory grounds, and even place limits on the emigration of skilled workers:

> England prohibited the export of all silk and woolen manufacturing tools in 1749, and this ban was expanded in 1774 to include cotton and linen equipment. In 1749 it also outlawed attempts to entice a skilled immig-

82 This is not to say that there were no attempts to do so, however. Much of the period between the first 'great depression' in 1873 and the end of the Second World War can be seen as a struggle between continental powers and the US played out within the space opened by declining British hegemony. Ironically, for much of this period Germany was by far the more technologically advanced power. But it had no access to the vast frontier of appropriation available in the continental US. This struggle between the US and Germany reached its apex in the Nazi attempt to unify Europe and expand Eastward through the violent establishment of settler-colonies, a program that was explicitly modelled on the US example. If we were to create a spatial model at an extremely high level of abstraction, we could imagine the global expansion of industrial society as something like the problem of atmospheric dispersion: a turbulent, chaotic system subject to competing push and pull factors in which we can nonetheless identify a (largely lateral and mostly Westward) movement in the spatial mean of the system even while it expands in essentially all directions, with a particularly strong backflow toward the East.

> rant from the British Isles to the colonies and in 1774 imposed a ban on the emigration of mechanics to the colonies. These restrictions were further tightened after the American Revolution …[83]

In response, supporters of industrialisation in emergent centres such as the US turned to illicit methods, raiding British ships, poaching skilled workers, smuggling high-tech machinery, and flagrantly violating intellectual property laws.

Many of these practices were already well-established prior to independence. The American Revolution had itself emerged in part out of the institutionalised corruption and piracy long prevalent across the Atlantic colonies. But industrialisation gave these practices an added weight, since the theft of industry secrets allowed local capitalists to then construct domestic engines of endogenous growth that could drive down the price of manufactures and thereby challenge the dominance of established firms supported by the leading mercantile powers such as Britain and France. In his capacity as assistant secretary for the Treasury, Coxe himself helped to establish clandestine financing networks for the illicit acquisition of British artisans and machinery, operating alongside consortiums of patriotic businessmen in emerging centres such as Philadelphia. The British responded to these methods by intensifying emigration and customs checks, stealing back machines that had been sold to the Americans, and even sending agents to burn down factories found to have purchased such machinery.[84] But these measures had only minimal effect.

Soon, the US had become a major industrial power in its own right, with massive new manufacturing complexes founded in New England by industrialists such as Francis Cabot Lowell, who had travelled to Britain for 'health reasons,' illicitly toured factories in Glasgow, and then used his observations to establish the Boston Manufacturing Company, which operated a series of cotton mills in Massachusetts.[85] As the century progressed, the American System grew increasingly extensive and formalised, with a scheme of protective tariffs in place from the 1820s onwards, accompanied, somewhat ironically, by the world's most efficient and comprehensive system of patent laws designed to protect the intellectual property of the country's nascent industrial interests.[86]

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83 Andreas 2013, pp. 103–4. These policies were themselves based on Britain's own experience in its competition with established commercial powers such as the Dutch, with the British textile industry itself jumpstarted 'by wooing Flemish weavers, Huguenot silk workers, and other foreign artisans to England …' (Ibid.).

84 Andreas 2013, pp. 99–103.

85 Andreas 2013, p. 111.

86 The early US patent system was quite literally formalised smuggling: 'the Patent Act did

Relatively high labour costs and the bargaining power that cheap frontier land gave to workers also encouraged US firms to adopt more capital-intensive production than their European counterparts. Given this fact, the central government, 'acting through the War Department's federal armoury' helped to initiate and coordinate 'new production methods using interchangeable parts, precision gauges, specialist machines operated by relatively unskilled labour, and management control information systems …' laying the groundwork for the American System to move from a loose set of policy proposals and illicit forms of industrial espionage into a coherent network of institutions designed to channel and stimulate the accumulation of capital.[87]

Wars served as crucial inflection points at every stage of this process. First, the Revolutionary War and the War of 1812 asserted the political independence of US elites despite the persistence of economic dependence on the British. The Civil War then triggered a series of advances in industrial technologies such as canning and the mass production of munitions, and vastly increased state capacity, which effectively subsidised productivity increases within industry while also allowing the federal state to encourage further and faster Westward expansion. The victory of the North also laid the groundwork for an unprecedented boom in both finance and industry during the subsequent Gilded Age. The National Banking Act of 1863, established to help finance the war, 'also established the powerful Office of the Comptroller of the Currency within the Treasury department to oversee the new system of nationally chartered banks, as well as a uniform national currency that would replace the state-level bank notes of the 'free banking' era.'[88] This period also saw the Treasury establish the national income tax and begin to offer Treasury securities on the domestic market, financing increased state expenditure and enabling macroeconomic policy to operate on an entirely new scale.

It was therefore only after the Civil War that the national banking system that Hamilton had laid the foundation for finally began to take shape in full, placing the Treasury in a central position in relation to the emerging finan-

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not protect foreign inventors; they could not obtain a U.S. patent on an invention they had previously patented in Europe. In practice, this meant that one could steal a foreign invention, smuggle it to the United States, and develop it for domestic commercial applications. The patent registration "allowed wealthy importers of European technology, such as the Boston Associates, to claim exclusive rights to imported innovations and use the courts to validate their claims and intimidate competitors." In other words, the law could be used to protect lawbreaking. Through its discriminatory patent rules, America became the world's most notorious haven for industrial piracy.' (Ibid.)

87 Panitch and Gindin 2012, p. 27.

88 Maher and Aquanno 2024, p. 37.

cial hub in New York and thereby forcing it to take on new roles in monetary management.[89] In supplying liquidity during periods of crisis, however, given the absence of a Central Bank, the Treasury was forced to instead rely directly on leading financiers who took on increasingly state-like functions. For example, the government responded to a series of crises near the turn of the century 'by effectively writing J.P. Morgan blank checks and relying on him to dispense the necessary liquidity to stabilise the system.'[90] Meanwhile, much as Hamilton had predicted, the leveraging of land values via this new financial complex ensured that Westward expansion would drive proletarianisation, marketisation, and industrialisation, fuelling ongoing wars of conquest against the indigenous nations while also undercutting the rise of a potentially rebellious population of yeoman farmers.

6 The Trust

Despite being seen as an era of unregulated excess, then, the Gilded Age also represents the chaotic symbiosis of the ascendant class of corporate robber barons and the increasingly powerful state that underwrote their interests. And yet the state did not summon industry into existence. Instead, it cleared the path and helped to stabilise a process of intensive accumulation already underway. This was evident in the rise and consolidation of an entirely new generation of US capitalist interests operating through increasingly complex corporations that were themselves linked to an increasingly organised state. As in the case of the British construction contractors during the early Victorian boom or the Chinese group companies today, the industrialisation drive saw the emergence of 'trust' companies of unprecedented size and scope, structured according to novel principles of corporate organisation that more firmly linked industrial powers to the country's dense but decentralised financial networks. And, similar to the emergence of the contract manufacturers out of the seething mass of small-and-medium-enterprises (SMEs) in Taiwan, many of these trust companies 'had emerged out of capitalist firms that had begun small and then diversified and competed to build nation-wide markets.'[91] This growth was facilitated at every level by the government, which 'issued corporate charters allowing for the pooling of capital for the purpose of complet-

89 Panitch and Gindin 2012, p. 32.

90 Maher and Aquanno 2024, p. 53.

91 In the US case, however, these small firms had originally been oriented toward the sizable domestic market, rather than the export sector. Maher and Aquanno 2024, p. 28.

ing large-scale public projects, particularly infrastructure development.'[92] As summarised by socialist thinker Stephen Maher: '[t]he modern bureaucratic state and corporation emerged through a series of increasingly large-scale and capital-intensive projects planned and executed by the state.'[93]

Not surprisingly, railroad contractors such as Cornelius Vanderbilt led the charge, funded in part by speculative capital pouring out of the City of London: 'By 1890 railroads – the first really big US businesses – accounted for half of all capital nation-wide, and they had greatly stimulated further industrial production, as well as the emergence of the first bond-rating agencies …' In this way, 'the initial models of private corporate organization were constructed with state support to build and operate the national rail system, which was accompanied by the formation of a national financial system' and which would later serve as 'the model for the equally monumental project of electrification …'[94] But overinvestment in the sector and a series of crises also 'led financial capital to turn increasingly towards the development of securities markets to raise funds for the manufacturing industry, whose growth had by then begun to outstrip its capacity to fund all its own capital requirements.'[95] These new manufacturing companies were already extremely capital intensive and their amalgamation only made them more so: 'In the last three decades of the nineteenth century, capital invested per worker almost tripled …' despite extremely rapid population growth.[96] The scale of consolidation only accelerated thereafter: 'In the period 1897–1904, over 4,200 firms were combined into 257, and by the end of that period 318 American companies owned some 40 percent of the entire nation's manufacturing assets.'[97]

However, even behind the barrier of protective tariffs, the large size of the domestic market ensured that these trust companies remained extremely competitive despite their monopolistic scale. In fact, the entire period 'was characterised by fierce competition, especially over organizational forms and intellectual property,' leading 'the state to establish a model of *corporate self-regulation*, whereby a relatively small number of banks and the corporations they controlled organized markets and stabilised prices within broad state-enforced parameters, while still competing intensively for profits through other

92 Maher 2022, p. 41.
93 Ibid.
94 Ibid.
95 Panitch and Gindin 2012, p. 28.
96 Ibid.
97 Panitch and Gindin 2012, p. 30.

means.'[98] In this model, codified in the New Jersey Corporation Act of 1889, 'the patchwork system of state regulations related to corporate organization was replaced by a consistent national standard,' replacing 'the prior model of states chartering firms to undertake specific public works tasks' with a new, privatised approach, 'in which the corporation was the primary form for organising large-scale industrial capital.'[99] It was this system that would first give rise to the modern image of monopoly and its supposed disruption of the price mechanism, spawning perennial claims that a new type of capitalism ('finance capitalism,' 'monopoly capitalism,' 'state capitalism,' etc.) rooted in price-setting and state collusion had replaced the older variety founded on liberal principles of competition. But none of these were qualitatively new features. They were simply those same principles of competition deployed more extensively and at a larger scale.

The ultimate result was a gradual geographic reorientation of economic power that would soon become evident as US firms sought entry into international markets. But the hegemonic shift that eventually followed was neither preordained nor obvious at the time. While GDP per capita in the US had risen dramatically over the first half of the nineteenth century despite rapid population growth, it still trailed well behind the British industrial behemoth. In 1820, US GDP per capita was slightly more than 73 percent of that in the UK and, by 1870, it had only risen to around 76 percent. The 'Great Depression' of 1873 was, in retrospect, something of an inflection point. Even though the decades that followed were the height of the Victorian era, during which the British Empire reached its greatest geographic extent, those same years also saw the US slowly begin to overtake the British in many of these economic measures. By 1913, American GDP per capita had slightly surpassed that of the UK. By 1950, the relationship had fully inverted, with the UK figure some 72 percent that of the US.[100] This inversion was driven, at root, by rapid industrialisation. By the end of the nineteenth century, US manufacturing productivity was higher than that of the UK, and the 'US share of world production, already 23 percent in 1870, reached 30 percent by 1900 and 36 percent by 1913.'[101]

But, rather than an oceanic empire, the US was a continental one and, as a result, much of this growth was initially driven by the substantial size and rapid expansion of the domestic market. In exported manufactures, the catch-up was

98 Maher 2022, p. 42, italics in original.
99 Maher and Aquanno, pp. 37–8.
100 These figures are derived from the 1990 constant dollars measure used in: Maddison 2007, p. 382, Table A.7.
101 Panitch and Gindin 2012, p. 28.

slightly slower, with the US not only trailing the UK well into the twentieth century but even lagging behind Germany, which had since become a global leader in cutting-edge industrial technology: 'By 1913, the UK's share of world manufactured exports had fallen to 32%, whereas the USA's share had increased to 14% and Germany's share had increased to 20%.'[102] Nonetheless, this was the period in which the initial contours of US hegemony would become visible within the global market, with many of those same Gilded Age industrial conglomerates going on to play crucial roles in the economic order well after the end of the Second World War: 'almost 30 percent of the companies that made up the Fortune 500 list in the 1990s were founded between 1880 and 1910.'[103] Both JPMorgan and Chase National Bank – today fused into the single most dominant financial firm in world history, JPMorgan Chase – were founded in the mid-nineteenth century and rose to become major conglomerates by the 1890s.

The internationalisation of US industrial interests took a substantially different form than its British precedent, rooting itself more firmly in the mute compulsion of economic power rather than in the extension of explicit political control over foreign colonies. This process by no means excluded military conflict or outright conquest, however. Especially in the Pacific, new territories were annexed with regularity throughout the first half of the twentieth century, with some (such as Hawaii and Alaska) eventually granted full legal status as states within the union and others (such as the Philippines and Nicaragua) placed in a grey area between traditional military-colonial administration and a neocolonial form of dependence that operated primarily through economic means.

On the whole, however, the internationalisation of US power in the early twentieth century saw the gradual abandonment of expensive and expansive colonial regimes in favour of an informal empire able to extend itself anywhere that market forces prevailed. In seeking new sources of profit through these market channels, the emergent conglomerates themselves acted as the primary agents laying the foundation for what would then become 'geopolitical' power. In many cases, this relationship was apparent. US multinationals such as the United Fruit Company bought up land in foreign markets, recruited armies of low-paid labourers, and then linked these new sites of plantation production to

102 Kitson, Michael and Michie, Jonathan June 2014 'The Deindustrial Revolution: The Rise and Fall of UK Manufacturing, 1870–2010', *Centre for Business Research, University of Cambridge*, Working Paper 459. https://www.jbs.cam.ac.uk/wp-content/uploads/2023/05/cbrwp459.pdf

103 Ibid.

global markets by building out ports, railways, and steamboat shipping routes. Similarly, US intervention after the Mexican Revolution was conducted to protect US oil interests, even though it was 'justified in terms … of assisting the Mexicans to follow constitutional procedures, to elect "good men" and create "a stable, law-abiding society".'[104] In other cases, political imperatives seemed to lead, as in the burst of industrial development that attended US entry into WW I. The war itself acted as another crucial inflection point, similar in kind to the Civil War but now operating at an immediately international scale.

Meanwhile, US investment and even explicit military interventions were increasingly rendered in essentially anti-imperialist terms, with president Wilson counterposing the mercantile violence of the old European powers to a US-led '"peoples' war" for self-determination' that appealed to progressive sentiment so effectively that 'his calls for a "peace without victory" and no secret treaties filled the vacuum created by the collapse of the Socialist International in 1914.' The counterintuitive result of this was that 'the US became … a "powerful beacon of hope" for European Social Democrats, from Kautsky and Bernstein in Germany to Webbs and MacDonald in Britain,' laying the groundwork for 'the informal alliance between US Democratic administration and Social Democratic Parties in Europe that would later be consolidated during the New Deal,' and would repeatedly serve as the liberal bulwark against the communist threat soon embodied in the figure of the USSR.[105] Similarly, rather than initiating a wave of open conquest, the standing army receded in the wake of the war – or, more accurately, turned inward to suppress labour rebellions – in favour of a massive outward expansion of trade over the course of the 1920s.

By the middle of the decade, 'manufactured goods exports were double what they had been before the war, and from 1922 to 1928 total exports grew almost 50 percent faster even than domestic GDP, which grew in real terms by 40 percent.'[106] This then placed US firms in an increasingly central position within the global economy, even as the US government rejected political responsibility for overseeing the international economic order. Regardless of political intent, however, with the rapid ascent of US trade 'the dollar became the major reserve currency in the world financial system, albeit still sharing the stage with sterling, and to a lesser extent, the franc.' Capital flows also began to reverse, with US investment now pouring into Europe and US firms leading a wave of acquisitions, such that 'over the decade of the 1920s, the book value of total American foreign direct investment increased by 129 percent in manufacturing, and 95

104 Panitch and Gindin 2012, p. 46.
105 Panitch and Gindin 2012, p. 47.
106 Panitch and Gindin 2012, p. 49.

percent overall.' This influence was especially strong in Latin America, where 'US investment finally exceeded Britain's,' with much of it concentrated in the manufacturing and resource industries.[107]

Rather than tactical manoeuvres in a grand political strategy to extend US power across the Americas and the Pacific, then, the basic profit-seeking activities of the multinationals generated a *de facto* US sphere of economic influence that was then *post facto* presented as a calculated political policy in select cases when the state had to step in to protect the property of the trusts. The ideology of the Wilsonian project was, therefore, largely a retroactive measure that justified economic trends that were already well underway. In a practical sense, the federal government's day to day involvement did not constitute any grand strategy and was certainly not driven by some noble historic mission but was mostly limited to the promotion and policing of these overseas ventures. In fact, the most active and regular state involvement in these projects was usually provided not by the imperial force of the US military but instead by local governments – and, in many cases, these were governments of independent nations, as in Latin America – which passed agrarian laws to marketise land, provided direct grants and other financial incentives to the multinationals, and stepped in to displace peasants and violently suppress strikes by plantation workers. Though the period certainly saw examples of direct rule, as in the Philippines, and a number of policing actions by American gunships, mostly focused on major infrastructure projects such as the Panama Canal and its proposed Nicaraguan counterpart, it was only much later, at the height of the Cold War, that direct US intervention would become the norm.[108] Throughout, the gunboats mostly served as the silent backdrop for the noisy expansion of trade and investment.

7 Bringing the War Home

Financial disorder in the wake of WW I also drove a surge of inflation followed by an induced economic crisis, triggering near-insurrections in war torn Europe and driving a wave of industrial agitation in response to the rising cost of living across the US. Rather than fuelling a colonial expansion in the style of the British, however, the military capacities that the US built up in the course of the war were instead deployed internally: 'the American state's increased coer-

107 Ibid.

108 For a history of the Banana industry in Latin America, see: Molberg and Striffler 2003.

cive powers were in fact mainly applied at the end of the war to the violent repression of industrial militancy and socialist politics at home.'[109] The Palmer Raids are likely the best-known of these interventions, with the Department of Justice leading efforts to capture, arrest, and deport anarchists and communists throughout the country, resulting in the detention of several thousand individuals and the effective destruction of the IWW, which had up until that point been by far the largest and most influential formal party of the nascent communist movement. Similarly, the country's best-known socialist figure, Eugene Debs, was imprisoned for sedition in 1918 due to his open opposition to the war and would remain behind bars (running for president from prison in 1920) until the end of 1921 – when he was released without pardon, dying of health issues aggravated by imprisonment several years later. But this first Red Scare was far more expansive than a simple policing action.

The end of the 1910s and beginning of the 1920s was a period of bloody class warfare, in the most literal sense. In 1919, the Great Steel Strike broke out, involving hundreds of thousands of steelworkers in major production hubs such as Pittsburgh, Chicago, and Gary, Indiana, and initiating a broader strike wave 'in which a record 5 million American workers participated in 3,600 separate disputes.'[110] After the year was through, 'one out of every five industrial workers [had been] involved in a stoppage.'[111] Industrial unrest of this scale was unprecedented in the US, alarming a ruling class fattened on long decades of Gilded Age excess and recently gorged on a cornucopia of war contracts. Despite the Steel Strike itself being officially led by the more conservative AFL and even receiving the passive support of Wilson, then, the large steel trusts successfully mobilised anti-communist sentiment in the wake of the Russian Revolution to portray the strike as an effort masterminded by foreigners and radicals, focusing attention on figures such as William Z. Foster, co-chair of the national strike committee and a well-known syndicalist. Mimicking practices in other sectors, the trusts also played on racial divisions within the workforce by offering scab jobs to black and Hispanic workers to stoke resentment among white strikers. In 1917, the same tactics had allowed companies in St. Louis to successfully divert a localized strike wave into a deadly race riot that pitted white workers against black workers rather than their shared employers. In the 1919 Steel Strike, more direct repressive measures also emerged, including the use of spy networks and, increasingly, armed forces. The companies first collaborated with state police, who deputised veterans, tradesmen and security

109 Panitch and Gindin 2012, p. 47.
110 Tooze 2014, p. 343.
111 Tooze 2014, p. 340.

guards to break up pickets and enforce a ban on mass meetings. Then, following a clash between strikers and police in Gary, Indiana, martial law was declared, and the US Army took direct control of the city. The strike ended soon after.[112]

Though the Steel Strike was the largest single labour conflict, it was hardly the bloodiest. These same years saw a series of Coal Wars across West Virginia that pitted sheriffs, militarised detective agencies, and demobilised soldiers against armed miners and their local supporters – many of whom were also veterans of the war. For example, in the Battle of Matewan,

> Sid Hatfield, municipal police chief, deputised armed workers, many vets from World War I, in order to stop the evictions carried out by the Baldwin-Felts detective agency in retaliation against union efforts … Armed combat later ensued, a shootout that left seven detectives dead, two workers and the mayor Cabel Testerman. The Detective Agency would later murder Sid Hatfield in revenge after he was acquitted by the courts of wrongdoing. Enraged miners raised a workers' army of thousands, the largest armed uprising in US History since the Civil War and attempted to unionise the county by force and avenge their fallen officer, Sid Hatfield. The county sheriff, financed by the mining corporations, would raise a reactionary army in response, which defeated the workers' army and thus the workers' government.[113]

Less than a year later, an even larger mobilisation emerged in the Battle of Blair Mountain, which saw more than ten thousand armed miners mobilised against thousands of law enforcement officials. After a month of skirmishes, federal troops arrived to put down the rebellion.[114] In the end, the defeat of the strike wave in the steel and coal sectors reshaped the political terrain on which class struggle would play out in the US for decades, if not the remainder of the century: 'It was a shock from which the American labour movement was never to recover. Talk of industrial democracy was abandoned in favour of the new managerial discipline of "industrial relations" and company unionism.'[115]

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112 The experience of the strike was integral to the formation of the Communist Party USA, which Foster would help to found. His own firsthand account remains among the best histories of the strike: Foster, William Z. 1920 *The Great Steel Strike and Its Lessons*, New York: B.W. Huebsch.

113 Hernandez 2024, footnote 23.

114 For an overview of the Coal Wars, see: Corbin 2011.

115 Tooze 2014, p. 342.

Meanwhile, new forms of passive discipline began to play out in the background. The war itself had been funded through an unprecedented expansion of public debt, now held by private investors. This was itself uncharted territory: 'Never before had the Federal government managed public debt on this scale.'[116] Nonetheless, concerned that 'any large increase in interest rates would devalue the outstanding stock of Liberty Bonds,' the government at first refused to raise rates to drive down inflation.[117] Only after the strike wave had demonstrated the incendiary potential of the working class and inflation continued to rise through the first half of 1920 did the authorities finally change course. In perhaps the first fully government-coordinated macroeconomic intervention in the US (no longer relying on J.P. Morgan's private check book), interest rates were raised rapidly, triggering a sharp fall in prices and thereby inducing a brief but sharp deflationary crisis.

Within industry, 'output plummeted and unemployment shot up,' reaching an estimated twenty percent in 1921.[118] New fiscal restrictions were rolled out and soon tariffs were raised as well. As a result, 'the terms of trade for American farmers collapsed and were not to recover for the rest of the twentieth century.'[119] The agricultural crisis thereby also signalled the ruin of the Wilsonian progressive compact that had dampened the spark of rural populism stoked in the Gilded Age. This compact had been founded on lucrative prices for exported agricultural goods enabled by the low tariffs included in Wilson's 'New Freedom' platform in 1913. Raised tariffs in the 1920s completely undercut these benefits and drove a new wave of rural agitation. As a result of the collapse in cotton prices, for example, 'farmers resorted to "night riding," threatening arson against ginneries and warehouses that paid inadequate prices.'[120] More grimly, with the IWW suppressed, Debs imprisoned, and the unions beaten bloody, the far-right took the place of the socialist left: 'Across the South and much of the West, the agrarian crisis fuelled the second coming of the Ku Klux Klan,' which saw membership surge 'from a few thousand in 1919 to as many as 4 million by 1924 – one in six, the Klan claimed, of the eligible male population.'[121]

Moreover, given the increasingly central role of US trade within the world economy, the impact of these macroeconomic interventions was equally expansive: 'America's fiscal policy and tariffs sucked demand out of the global

116 Tooze 2014, p. 344.
117 Ibid.
118 Tooze 2014, p. 346.
119 Ibid.
120 Tooze 2014, p. 347.
121 Ibid.

economy at the same time as the first rate hikes ever delivered by the Federal Reserve sucked gold and with it monetary liquidity out of the world economy.'[122] After Wilson left office, the incoming Harding administration pushed through emergency legislation raising tariffs 'on average by 60 per cent' and authorizing the Federal government 'to use the threat of punitive tariffs to extract concessions from major trading partners.'[123] Unemployment therefore increased not only in the US, but across Europe as well, helping to break similar strike waves that had begun to approach insurrectionary proportions in places such as Germany and Italy. On the whole, the macroeconomic management standards established in the 1920s were therefore even more important to the disciplining of labour at the global scale than military force in any individual country. Meanwhile, American exceptionalist policies that kept tariffs high and subjected European polities to strict financial controls via the holdover of wartime loans and reparations payments established the basic economic conditions that would set the stage for the rise of fascism. Ultimately, then, 'the conservative restoration' of the decade was guaranteed less by the outright violence of martial law and more by 'the dull compulsion of deflation.'[124]

This period thus marked an important evolution in the American System across several registers. At home, it would see the passive enforcement of proletarianisation via the old Hamiltonian project of land leasing and the new Wilsonian project of macroeconomic intervention, all accompanied by increasingly active and extensive enforcement of property rights in the form of police and military action against unionists and socialists. In the case of the latter, violent strike-breaking was then often followed by compromise legislation intended to better regulate troublesome sectors by mandating against the most egregious practices, as in the Norris-LaGuardia Act passed by the Hoover administration in 1932, which effectively legalised unions (by banning 'yellow-dog' contracts in which employers required workers to sign an agreement not to join a union) and set the stage for later labour reform legislation during the New Deal.[125] The basic pattern was strikingly similar to that seen in the emer-

122 Tooze, Adam 18 August 2024 'Chartbook 310 The shock of the new: Dollar dominance and the modern monetary macro in the 1920s. (Hegemony note 5)', *Chartbook*. https://adamtooze.substack.com/p/chartbook-310-the-shock-of-the-new

123 Tooze 2014, p. 349.

124 Ibid.

125 This legislation followed from decades of progressive liberal organizing that had long been attempting to counter the threat of growing working-class radicalism in the wake of the Gilded Age. Figures such as Wilson emerged from this Progressive Era milieu, which spanned civil society – where muckraking journalists and philanthropic organisations

gence of central banking and passage of the Factory Acts in England a century prior – again in response to a series of strikes and ensuing economic crises – and in the slow passage and slower enforcement of Chinese labour legislation today, which similarly followed a strike wave, a global economic crisis, and the systematic reform of the fiscal and financial machinery. In every case, labour's own antagonism against capital both provides the opening to build communist power and, at the same time, serves to develop capital itself, defeating the struggle through its apparent victory in the form of 'progressive' gains. More than this, struggle also helps to organise many singular capitals embodied in many individual firms into an increasingly coherent class force opposed to the workers and embodied, ultimately, in the state.

8 Capital in Labour

Facing a similar sequence of struggles in Europe after WW II, Mario Tronti argued that this subsumption of class conflict within the development process was only possible because of the fundamentally contradictory role of labour within capitalist society. On the one hand, based on his analysis of the violent class conflicts that had rocked American industry in the interwar period, Tronti stressed that these struggles function much as Camatte describes them, advancing the general domestication of the species:

> The process of the objectification of each social relation within capital carries with it a historic charge that accumulates as it advances. This builds up an irresistible force: from commodity fetishism to capital fetishism, by way of a whole era of positive violence, the reduction of everything that is socially alive to something dead seems practically complete.[126]

Similarly, he emphasises that the high tide of working-class agitation meets defeat in its very victory: 'When the workers win a partial battle, they later realise that they have won it to capital's benefit.'[127] Labour thereby becomes the means of its own domination. In the wake of historic struggles over the working day, Tronti concludes: 'The working-class struggle had thus imposed

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focused popular attention on corporate overreach – and formal government institutions, which had already seen major voting reforms and rudimentary labour legislation, driven by an alliance between the AFL and the Democrats.

126 Tronti 2019, p. 219.

127 Tronti 2019, p. 208.

capital's own interest upon it; that is, capital had imposed its own interest on itself via the mediation of the working-class struggle.'[128] In this role, the working class itself becomes 'a propulsive force behind development … its dynamic foundation: the working class as a motor that drives capital.'[129]

On the other hand, since capital relies on the 'vital ferment' of living labour for its own survival, labour must remain separate from and antagonistic to capital. It is precisely the antagonistic vitality embedded in value that provides capitalist society with its own undead vigour. And, since this antagonism is continually reborn in the same form, the basic coordinates of the communist program therefore remain invariant, as do many of its fundamental targets and tactics, such as the wage and the strike:

> … capital – as a production relation, and thus a class relation – undergoes an indefinite process of socialisation, in its spiralling development. At each passage through an acute moment of confrontation between the two classes, which is to say, each time the class relation emerges as the force driving the whole process, there takes place as a consequence a leap forward in socialisation. And this, in turn, reproduces, in an enormously expanded form, the class relation itself.[130]

Subsistence struggles therefore serve as something like the steady state within which the activity of the historical party operates.

This steady state can only be broken by distinctly political interventions that exceed the bounds of these subsistence struggles – and this is why Lenin serves as such a central figure in Tronti's argument, since it is the practical Leninist project more than the theoretical Marxist one that demonstrates the basic lesson. It is only when these struggles remain politically 'partial,' when they are severed from the larger project of building communist power, that they serve to secure an even more expansive victory for capital as codified in labour reforms and even the incorporation of the 'workers' movement' into the administration of society. The lesson is even more important in eras of instability or hegemonic decay, since these are precisely the periods in which capital needs to be restructured, and labour's struggle within-but-not-against capital is ultimately the force that animates this process. However, the possibility of such a defeat does not mean that such struggles are futile, because capital's own unfolding

128 Ibid.
129 Tronti 2019, p. 199.
130 Tronti 2019, p. 206.

also develops and socialises the proletariat. Contra Camatte, Tronti emphasises that domestication is ultimately only one side of the picture: 'the process of general socialisation cannot go so far as to liquidate the workers as a specific class … the process of total objectification cannot go so far as to liquidate the individual life of labour as active subject, cannot and must not reduce to passive, dead objectivity the same vital ferment that sets everything into activity through production …'

In addition to its domesticating force, then, it also continually regenerates the feral potential of the proletariat at larger and larger scales: 'it can and must increasingly socialise the class relation, such as it is, and ever renew the workers as an antagonistic class within.'[131] Not only do struggles remain possible, but the simultaneously 'primitive' and 'permanent form' of the strike only becomes more powerful:

> the strike is the cessation of activity by living labour – which is to say, its reduction to dead labour, its refusal to be work … And this is the most terrible threat that can be wielded against the very life of capitalist society. Living labour's refusal of activity is the recovery of its autonomy, which is to say, precisely the autonomy that the production process has to break.[132]

The historic party of the proletariat is therefore continually reborn in these subsistence struggles and its weapon remains, as always, the starving of capital via the withholding of labour. For Tronti, this 'refusal' is the crucial moment that decides whether such struggles are fated to develop capital or to serve as the political development of communist power.

Ultimately, these struggles would be losing ones, with the New Deal and then the postwar anti-communist compromise between Big Business and Big Labour inscribing the defeat of the proletariat into the state. As in the earlier transition to steam power in England, these working-class victories were also a crucial factor in the rapid advance of productivity that began in the 1920s, stalled in the early Depression years, revived in the latter half of the 1930s, and was then expanded via wartime production and secured in the postwar boom.[133] Meanwhile, progressive reforms and new infrastructural systems had begun to ensure easier access to education, such that the share of US workers 'who had only an elementary school education declined from 75 percent in 1915

131 Tronti 2019, pp. 219–20.
132 Tronti 2019, p. 221.
133 Gordon 2016, p. 537.

to 30 percent in 1960 …'[134] Thus, employers were able to deploy new machine systems in the place of increasingly expensive labour and find more technicians capable of operating them. Since there were fewer of these technicians needed, they could also each be paid higher wages without necessarily driving the firm's overall wage bill up. The ultimate effect was that the 'ratio of output to capital input (the average productivity of capital) almost doubled between the 1920s and the 1950s.'[135] The domestic character of the American System therefore evolved beyond the rudimentary proletarianisation advocated by Hamilton to encompass the proactive sculpting of new strata of technical workers in accord with the imperatives of the total social capital.

9 Internationalisation and Hegemonic Decay

At the same time, the late nineteenth and early twentieth centuries also saw the American System evolve under intraclass pressure, with the relation between state and capital reshaped by the new scale at which competition was being conducted within a growing world market still dominated by the British. Internationally, this new iteration of the American System was visible in the back-and-forth of liberalisation and protectionism adapted to the new promotional roles of the state. For example, the McKinley Tariff Act of 1890 and its subsequent development into a flexible system that allowed for variable tariff rates to be set by the central government essentially converted the tariff 'from a purely protectionist mechanism (and the federal government's main source of revenue) into a lever for bargaining with other states' in the drive to expand markets for US goods and secure sources of raw materials for US industries. Similarly, the State Department created a new Bureau of Foreign Commerce in 1899, which was followed by the Department of Commerce and Labour in 1903, 'with special agents assigned "to report on worldwide markets for specific American goods," …' all undergirded by the steady expansion of US naval power in the Caribbean and the Pacific.[136] These institutions would then come into their own after WW I, serving as the basic scaffolding for the assistance of US multinationals in their rapid overseas expansion and offering a ready-made toolset for the macroeconomic interventions of the early 1920s.

134 Tronti 2019, p. 544.
135 Tronti 2019, p. 545.
136 Panitch and Gindin 2012, pp. 35–6.

However, even though the US had become a major hub in the emerging planetary factory by the beginning of the twentieth century, it nonetheless enjoyed only meagre financial power in a world still dominated by a gold-sterling administered from the City of London. The founding of the Federal Reserve in 1913 was intended, in part, to provide a means through which to internationalise the dollar. But this internationalisation only began to truly take shape after WW I, in part because of the dollar's roll in recycling the debts incurred by European powers during the war. Under the Dawes Plan, JP Morgan & Co (by then under the leadership of J.P. Morgan Jr.) had underwritten a massive loan to the German government and then floated the loan on US credit markets, opening lending channels from American banks into the Weimar republic that funnelled US capital into Germany and then out again in reparations payments to Britian and France. In addition to wartime loans made to the allies, these lines of credit were what then exposed European markets to the deflationary policy of the Federal Reserve throughout the 1920s.

Meanwhile, already faced with rising competition from emergent industrial powers in Europe, the Americas, and Japan before the war, Britain was no longer able to practice free trade unilaterally. Instead, it had begun to harden its imperial power through control over the gold standard, 'with the Bank of England's management of gold-sterling exchanges and the City of London's deep and liquid discount markets at its epicentre.'[137] By the time that WW I broke out, the international gold system had thereby become the backdrop against which various spheres of influence and tariff-based trade agreements were being carved out, with the British Empire no longer the unchallenged sovereign so much as the slowly waning centre of gravity for finance and world trade. Developmental bursts elsewhere continued to pose competitive threats to Britain's established industries, increased the pressure on the gold sterling system, and drove new speculative booms and crises of overproduction that then cascaded through a fracturing structure of world trade. This was the context in which the US was able to pose itself as an anti-imperialist force agitating against the increasingly onerous rule of the British and pushing for 'self-determination' for all colonies, per the Wilsonian project, all while Wilson's own administration ensured the exclusion of colonised nations from the post-war settlement.

But this period was also an interregnum. And, although the ascent of the US appears to us today as if it were predetermined by the churning gears of history, in the always-contingent moment, it seemed just as likely that other powers

137 Panitch and Gindin 2012, p. 36.

were set along the same path. For much of the nascent communist movement, economic crises, massive strike waves, and the sparking of revolutions in the East even appeared to signal that global capitalism was itself in the process of some catastrophic collapse driven by its own intractable contradictions. In retrospect, however, the period of systemic instability beginning in the 1910s proved to be neither the peak of imperial conflict nor the advent of capitalism's 'highest' or 'final' stage. It was instead something more like the opposite: nearly half a century of war and revolution marked the final stage in the *gestation* of capitalist society as a truly planetary order. Over a hundred years later, communist theorist John Smith would appraise this process from the vantage of world in which imperial inequities were more entrenched than ever: 'Imperialist domination and plunder was a necessary condition of the rise of capitalism in England, but it has taken the whole course of capitalist development for the imperialist division of the world to become internalised, to become a property of the capital relation itself.'[138]

The quiet but decisive ascent of the US beneath the calamitous conflicts of the old colonial empires marked the beginning of this process. But it would not be completed until the long decades that followed WW II, when the dollar would ascend across the Atlantic to serve as the *de facto* global currency (first backed by gold, then by fiat alone) and global trade would be rewoven in new networks spanning the Pacific and linking leading US firms to cheap pools of labour in Asia, all backed by the supremacy of American aircraft carriers and trans-continental nuclear warheads much as the British navy had once sat behind the sterling. In other words, imperialism proper has, in a way, only just been born. It is only in the past half-century that the uneven sectoral and spatial zoning of the social-metabolic process through which value is produced and appropriated across the planetary factory has truly come to encompass the entire human species. Perhaps the true horror of hellworld, then, is not that we find ourselves crushed in its gasping era of decadent twilight but instead that we lie awake at the very knife-edge of its gruesome dawn. Sun belts bloom to rust, wars sputter at the broken edges of world trade, prisons sprawl like cities and cities fortify like prisons as insurrections are strangled by their own umbilical cords, the sea level rises, and the floods wash in like a cool and cleansing tide. And yet what seems to be the churning chaos of capital's collapse is instead the mediocrity of its governance. This wealth of tortures is the renewal of wealth – labour born into the corpse of capital and this corpse made to live, again and again, through the children that it eats.

138 Smith 2016, p. 225.

10 Developmentalisms

From its very advent, the American System both served as prototype for and existed in competition with concurrent developmentalist projects in places like France, Germany, and Japan, all of which would then inspire the various reconstructive and 'catch-up' industrialisation drives that defined the period of decolonisation following WW II and which continue to this day. The rapid developmental gains of the US would even inspire emulation among various socialist governments, with the staggering industrialisation drive of the Soviet Union modelled in part on the Taylorist principles that had been piloted in the mass manufacturing systems of US industrial monopolies. Despite its persistent inequality and obvious history of conquest and colonisation, the US could serve as such a model precisely because its rapid development had been attended by salient decreases in poverty and the rollout of unprecedented amenities such as mass electrification and new public sanitation systems. Meanwhile, even if wage levels remained low relative to the wealth produced, wages in US industry remained high by global standards and tended to rise alongside rates of productivity and output, allowing for an expanding consumer culture. Though many of these trends would reach their apex only after WW II, they began to accelerate markedly as early as the 1920s.[139]

Progress was especially pronounced in the realm of poverty alleviation. In the aftermath of the Gilded Age, US poverty rates had fallen erratically from some 80 percent of the population in 1890 to roughly 50 percent by the late 1920s. Though the sudden reversal of the Great Depression, which saw poverty rise again to 80 percent by 1930, helps to explain the surge in popular radicalism in these years, poverty rates were again falling rapidly by the middle of the decade. The boom associated with WW II would then secure these gains, rapidly lowering the poverty rate to below 30 percent and ensuring the availability of basic amenities like electricity, road access, and housing.[140] But the developmental boom was far more expansive than a simple rise in income. Essentially every aspect of life was qualitatively transformed in the century stretching from 1870 to the 1970, with the fastest change occurring from roughly the 1920s onward. As Gordon emphasises:

139 Gordon 2016, p. 535.

140 Smolenksy, Eugene and Plotnick, Robert, March 1993 'Inequality and Poverty in the United States: 1900 to 1990', *Institute for Research on Poverty*, Discussion Paper 998–93. https://www.irp.wisc.edu/publications/dps/pdfs/dp99893.pdf

> The century of revolution in the United States after the Civil War was economic, not political, freeing households from an unremitting daily grind of painful manual labour, household drudgery, darkness, isolation, and early death. Only one hundred years later, daily life had changed beyond recognition. Manual outdoor jobs were replaced by work in air-conditioned environments, housework was increasingly performed by electric appliances, darkness was replaced by light, and isolation was replaced not just by travel, but also by colour television images bringing the world into the living room. Most important, a newborn infant could expect to live not to age forty-five, but to age seventy-two.[141]

Similar shifts would then occur even more rapidly in subsequent developmental booms, since these novel technologies could be rolled out at scale within the space of a few decades.

In each instance, developmental booms also generated a cultural impact, traceable in genre after genre of modernization tales contrasting rustic upbringings in the village to fast lives of work and consumption in a maze of shimmering skyscrapers seemingly raised overnight. While viral images of Chinese farmhouses in the shadow of the high-speed rail illustrate the trend today, the US developmental burst of last century produced similar contrasts. The sociotechnical transformation of American life described by Gordon reshaped the basic character of the built environment and the geographic distribution of the population in the space of a generation, driving an urban boom of unprecedented size and scale – though one soon outdone by postwar reconstruction in Europe and Japan. The urban population in the US more than doubled from some 23 percent in 1870 to 59 percent by 1950, despite a quadrupling of the total population. Housing followed, with the overcrowded, under-ventilated tenements of the early industrial era quickly demolished and replaced by an entirely new urban environment: '77 percent of the dwelling units in existence in the United States in 1940 were constructed after 1900, and most of these were initially constructed incorporating the new technologies of electricity, water, and sewer connections.'[142]

In one sense, US policies of active state intervention and rapid corporate centralisation served as literal models for reformers elsewhere. In another sense, however, these US policies evolved within a broader developmentalist environment that received substantial influence from similar experiments in

141 Gordon 2016, p. 1.
142 Gordon 2016, p. 95.

other countries, especially France and Germany. The original American System as advocated by figures such as Hamilton and Coxe had itself emerged from debates within the broader republican social milieu involved in the American Revolutionary War and its aftermath, which invariably spawned similar solutions to the problem of how catch-up development might be conducted under British hegemony. In Europe, for example, the French aristocrat and utopian socialist Henri de Saint-Simon played a role similar to that of Hamilton and Coxe in the US, although he never won the same degree of influence over state policy. In this case, the connection was quite direct, as Saint-Simon had fought alongside Hamilton in the 1781 Siege of Yorktown and his 'readers later included the Marquis de Lafayette, a member of Hamilton's circle.'[143] Though his early political education occurred in the American and French Revolutions, Saint-Simon then developed the bulk of his theoretical work in the aftermath of the Napoleonic Wars, when the French state turned from territorial expansionism to a combination of foreign investment and military economic stimulus in its attempt to compete with the rising power of British industry.

During this period, the French government 'encouraged not only the production of military equipment but improvements in transport and communications – often with the help of technologies first developed in Britain, to say nothing of British capital.'[144] It was hardly coincidental, then, that Saint-Simon's 'vision of a society led by the productive industrial classes' focused on a global picture 'of huge infrastructural projects like the Panama and Suez Canals linking the countries of the world with a federalised Europe,' a plan which was presented by Saint-Simon and his disciples to various world leaders. After his death, Saint-Simon's legacy went on to influence both right-wing industrialists in France 'like the Pereire brothers [who] pioneered industrial investment banking for large projects like railways' and leftist thinkers such as 'economist Constantin Pecqueur [who] developed the first coherent vision of a State Socialist planned economy,' which he portrayed as a sort of enormous workshop. Pecqueur's vision also marked a key turning point in utopian socialism more generally, combining the early utopian focus on artisanal labour with intensive state production targets and investment in spectacular infrastructural projects.[145]

By the 1830s, both the American System and its socialist counterpart began to gain new followers. The most important of these was the German economist Friedrich List, 'who had lived in the US, been a protege of Lafayette's and

143 Leung 2021b.
144 Wood 2005, p. 122.
145 Leung 2021b.

an associate of the Saint-Simonians' and, faced with the devastating impact of British manufactures on the German handicrafts industries, argued that the 'correct approach … was to mimic the "American system" by establishing a German Customs Union and developing domestic economic productivity.'[146] List's fundamental contribution was a theory of 'national economics' that both critiqued and amended the individualist political economy of figures like Smith and Ricardo. List's approach was also notable insofar as it focused less on abstract models of economic behaviour or the fanciful thought experiments favoured by early political economists and more on a concrete analysis of the actual history of development, with the first ten chapters of his masterwork, *The National System of Political Economy*, devoted to a series of national case studies. Among them, the US served as List's penultimate example and an explicit model for development in Germany. He was openly effusive in his description of the American project as a 'nation of colonists, which, in our own day, has arisen from the complete subjection of colonial dependence, and from the condition of separate provinces, united by no political bond, to that of a compact, well-organised, free, powerful, industrious, rich, and independent nation, in which our grandsons may yet see the first maritime and commercial power of the world.'[147]

From these historical examples, List then theorised that the wealth of the nation and therefore its survival was founded on the multilateral development of its productive capacities through a series of stages, alternating between periods of free trade and protectionism. Though 'free trade with nations of higher culture' was essential early on to 'emerge from barbarism' and 'improve their agriculture,' successful industrial development would then need to be ensured 'by means of restrictions [that] give an impulse to manufactures, fisheries, navigation, and foreign commerce.'[148] Similarly, List pointed to both the US and British examples to illustrate the importance of geographic expansion and access to crucial resources from the tropics.

His proposed solution was quite explicit: 'Companies should be organised, specially and adequately sustained and protected, which should establish themselves in maritime places, purchase large tracts of land in those regions, and prepare them for colonization by Germans.' Moreover, List argued that Eastward expansion could secure the same sort of continental power for Germany as Westward expansion had secured in the US: 'The same policy ought to be pursued with regard to the East, to European Turkey, and to the countries

146 Ibid.
147 List 1856, p. 166.
148 List 1856, p. 188.

of the Lower Danube … With five times less money and time than it requires to reach Lake Erie, an inhabitant of the Upper Danube can be transported into Moldavia, Wallachia, Servia, or to the south-west coast of the Black Sea.'[149] All of this was necessary because German industries were forced to operate within an unequal global market dominated by 'the power which sways the sceptre of commerce and industry.'[150] And, at the time, this sceptre was decisively in the hands of the British. List argued that the British were such adamant promoters of free trade precisely because the UK was the only nation that had reached the level of development at which free trade becomes lucrative for manufacturers, and thus its more established industries were the only ones capable of reaping the rewards of an open market.

11 Socialism with German Characteristics

Though List and Saint-Simon had less direct influence on political power than their Federalist counterparts in the US, their basic theories had nonetheless become integral to developmental programs in countries like France, Germany, and even Japan by the latter half of the nineteenth century. By setting the standards of these debates, their interventions also helped to shape the alternatives envisioned by the early socialist movement, as is visible in the example of Pecqueur. In fact, by the time that Marx began to draft *Capital*, both right-wing and left-wing variants of state-led developmentalism had already become common points of reference for European socialists. As a political intervention within this milieu, *Capital* was itself designed in part as a critique of overly simplistic utopian and developmentalist schemes for building socialism. Initially, he focused on the theories put forward by Saint-Simonians and earlier Ricardian socialists. But, toward the end of his life, these critiques grew more explicit with the rising influence of essentially Listian socialists such as Ferdinand Lassalle within the German workers' movement. Marx personally penned a critique of the Lassallean faction within what would become the Socialist Workers Party.[151]

It was Engels, however, who offered the most explicit engagement with the developmentalist position, pushing back against the notion that larger conglomerates and grander state intervention were inherently socialist:

149 List 1856, pp. 495–6.
150 List 1856, p. 186.
151 Marx 1875.

> the transformation – either into joint-stock companies and trusts, or into State-ownership – does not do away with the capitalistic nature of the productive forces. In the joint-stock companies and trusts, this is obvious. And the modern State, again, is only the organization that bourgeois society takes on in order to support the external conditions of the capitalist mode of production against the encroachments as well of the workers as of individual capitalists. The modern state, no matter what its form, is essentially a capitalist machine – the state of the capitalists, the ideal personification of the total national capital. … The capitalist relation is not done away with. It is, rather, brought to a head.[152]

Though Engels also argued that state-ownership and other forms of large, social-scale coordination of production conceal within themselves certain 'technical conditions' that could go on to form crucial elements of socialist production, 'this can only come about by society openly and directly taking possession of the productive forces which have outgrown all control, except that of society as a whole.'[153]

Nor is it coincidental that both Marx's rejoinder to Lassalle and Engels's polemic (primarily directed against another German socialist, Eugen Dühring) were situated within the specifically German political milieu. By the time that both pieces were written, the country had become the new hallmark of state-led economic development:

> Key among the followers of both Listianism and the American School was Otto von Bismarck. In the wake of the economic crisis of the 1870s, the growing workers' movement across Europe challenged the stability of the conservative German state. Drawing on the theories of Friedrich List and the US economist Henry Charles Carey, as well the advice of social democratic leader Ferdinand Lassalle and Social Policy Association leaders such as Gustav von Schmoller, Bismarck raised tariffs, nationalised Prussia's railways, and introduced workers' insurance and pension schemes.[154]

With Bismarck drawing directly from the advice of Lassalle, the German industrialisation drive was also among the first to be deemed both a form of 'state socialism' and a new and 'authoritarian' type of 'state capitalism' distinct from

152 Engels 1880.
153 Ibid.
154 Leung 2021b.

its more liberal British predecessor.[155] This was the political and discursive nexus against which the emerging communist movement would struggle to define itself.

It is therefore no coincidence that, in *Capital* itself, Marx unambiguously positions himself against the shallow developmentalisms that were already gaining traction within the socialist movement at the time, embodied in the idea that the advance of the productive forces was a necessary precondition for or would naturally or automatically give birth to a socialist order, or that state power could be mobilised to create a socialist society from the top down.[156] Ironically, these very ideas would later be attributed to Marx himself by subsequent generations of Listian socialists who, under the influence of the German Social Democratic Party and, later, the Bolsheviks, often took to calling themselves 'Marxists.' But, as William Clare Roberts argues: 'Nowhere in *Capital* does [Marx] argue or imply that capitalism has developed human productive powers to the point where we can meet everyone's needs, or that such a development would constitute a threshold before which the attainment of communism would be impossible.'[157] The 'productive forces' are instead always political, including the subjective development of the proletariat itself through its struggle against the dictatorship of capital. As a result, 'Marx's understanding of communism is opposed to both market socialism and the bureaucratic central planning of state socialism,' with the Paris Commune coming to approximate an alternative form of 'directly associated labour' capable of taking shape through the very process of destroying the capitalist state.[158]

12 Co-prosperity

In Japan, the Meiji Restoration followed shortly after the German developmental drive, with both Listianism and the American System exerting a direct influence: 'The 1872 ten-year plan for Hokkaido, for example, was developed by ex-Commissioner of the US Department of Agriculture Horace Capron, who

155 Ibid.

156 The first volume was published in 1867, with a substantially revised French edition produced in the 1870s, all under Marx's oversight. This was followed by a German edition based on the French but edited by Engels after Marx's death in 1883. The subsequent volumes are essentially unfinished notes, compiled, reorganised, and often extensively edited by Engels, who prepared them for publication in the 1880s and 1890s.

157 Roberts 2017, p. 171.

158 Roberts 2017, p. 246.

had been active in the Hamiltonian Whig Party circles,' and the former president of the Bank of Japan himself even helped translate List's major theoretical treatise.[159] By the turn of the century, the government had 'nationalised Japan's railways on Bismarck's example … monopolised the post, telegraph, water, gas, and steel industries, and began subsidising shipping and banking' for which it 'was referred to by the domestic press … and western journalists … as the most successful State Socialist country outside Europe, if not worldwide.'[160] The Japanese developmentalist drive was also founded on an intensive form of colonisation that saw the rapid and violent industrialisation of its colonial holdings. With the active involvement of both the military and novel conglomerates (called *zaibatsu*) such as Mitsui and Mitsubishi, 'the Japanese made enormous investments in Manchuria and Taiwan, essentially constructing an entirely new industrial structure from the ground up in the space of a few years …'[161] This process then gave birth to 'Second Tier' *zaibatsu* gestated through colonial trade, including Nissan, Nomura, and Kawasaki.[162] Specialised private-public monopolies such as the Manchurian Heavy Industries Development Company headed by Yoshisuke Aikawa, founder of Nissan – which held a 50 percent stake in the company, the other half held by the government – were even established to integrate industrial ventures in the new colonies and oversee economic planning.[163]

The project also continued to be influenced by later changes in the American System itself, which had progressed after WW I to the early stages of militarised mass manufacturing conducted by even larger and more integrated industrial monopolies:

> the Japanese manufacturing zone was large-scale, vertically-integrated, and thoroughly incorporated into the bureaucracy of wartime production. The factories' structure attempted to mimic the massive Taylorist conglomerates of the US industrial belt, with capital-intensive enterprises based on the most advanced machines, all operated by 'cheap Chinese labour and almost feudal labour management.'[164]

159 Leung 2021b.
160 Ibid.
161 Chuang 2016a.
162 Addicott 2017, p. 6.
163 Okazaki, Tetsuji, August 2013 'development and Management of Manchurian Economy under the Japan Empire', *CIRJE Discussion Paper*, p. 8. http://www.cirje.e.u-tokyo.ac.jp/research/dp/2013/2013cf899.pdf
164 Chuang 2016a.

These features only became more important as imperial power was consolidated and Japan prepared for total war.

Similarly, as Germany turned from the crises of the Weimar era toward the right, the continental power of the US continued to serve as an example. The Nazi economic strategy was simultaneously defined by admiration for the American project and opposition to rising American influence:

> … Hitler returned repeatedly to the American example in discussing Germany's future in the East. The Volga, he declared, would be Germany's Mississippi. And the bloody conquest of the American West provided Germany with the historical warrant it needed to justify the clearance of the Slav population … A 'superior' settler population would displace an 'inferior' native population opening the way towards a new era of economic possibility.[165]

By the 1930s, the US industrial model had even come to influence a USSR that, faced with the defeat of the revolution in Europe, had revived market production under the New Economic Policy (NEP), and then slowly embraced a state-developmentalist strategy of building up 'socialism in one country.' This strategy solidified under Stalin, codifying the Lassallean/Listian program rejected by Marx himself as the very backbone of a new 'Marxist' orthodoxy. Though Germany continued to serve as a key reference point for Japan and for certain factions of Chinese Nationalists, it was now this Russian example that proved more influential across Asia. Much of this influence occurred at the practical level, with prominent figures in both the Nationalist Party of China (who would later go on to design the developmentalist program in Taiwan) and the Communist Party of China trained by Soviet officers at the Whampoa military academy in Guangzhou and sent to Russia on exchange trips.[166]

Meanwhile, Manchuria became a major site for both practical experiments in economic planning and in the intellectual propagation of state-led developmentalism, with the colony's Kenkoku ('Nation-Building') University training a pan-Asian generation of technocrats and planners who would go on to structure developmental programs in mainland China, Taiwan, South Korea, and postwar Japan. The school helped to flesh out 'a state-led vision of industrialization and economic construction' with a series of economic planning and theory courses rooted in the work of List and an entire generation of Japanese

165 Tooze 2006, pp. 469–70.
166 Leung 2021b.

economists who had built on the German example, alongside the living models of the Fordist factory and the spectacular Stalinist industrialisation drive, which seemed, at the time, to be entirely immune to the Great Depression then gripping the capitalist world.[167] Through the influence of List, Ford, Stalin, the Kenkoku school, and this emerging generation of Pan-Asian technocrats, the developmentalist policies that originated with the American System would ultimately echo into South Korea and the Chinese mainland, where their early adoption by nationalist reformers would set the standards for the industrialisation drives of the latter twentieth century.

In China, for example, translations of List's work had become popular as early as 1901, and young scholars seeking to revitalise the declining Qing dynasty travelled to Japan to witness the success of the Meiji reforms, sparking a wide-ranging social debate about how the German and Japanese examples might be emulated. Both early nationalist leaders such as Sun Yat-sen and the emerging socialist current were deeply influenced by these debates, which were then spun off in two distinct directions by the Nationalist and Communist parties. Meanwhile, ongoing US influence in China was visible in the popularity of American Pragmatism, with the work of John Dewey gaining immense popularity among radical reformers.[168] Many of these figures even studied and worked at Kenkoku, where there was a 'tradition of staff and students traveling to the "red capital" of the CCP at Yan'an or the wartime Nationalist capital of Chongqing.'[169]

Similarly, Korean nationalists such as Choe Nam-seon and Kang Young-hoon were both Kenkoku alumni, and Park Chung-hee, who led the military takeover in South Korea in 1961, was a former officer under Japanese rule in the Manchurian puppet state, with his base of support within the army and bureaucracy (known as the 'Manchurian Clique') drawn from social networks established during this time. In mainland China, a number of former Chinese Kenkoku alumni would defect to the Communist Party and help to formulate postwar attempts at constructing a planned economy, with the industrial belt left by the Japanese in Manchuria serving as the core of socialist industry after the revolution.[170] The socialist takeover of Manchuria was itself led by a Mongolian Kenkoku graduate named Jirgal, who then went on to help formulate policy in what would become the Inner Mongolia Autonomous Region, where he worked until his death as Deputy Party Secretary and Vice-Chairman of

167 Leung 2021a.
168 Sun 1999.
169 Leung 2021a.
170 Chuang 2016a.

the province in the early 1980s.[171] Similarly, the extensive industrial infrastructure left on Taiwan after the Japanese defeat would be central to the economic recovery that followed the Nationalist retreat, with seized colonial firms in 'railway, sugar refining, electricity, petrochemical and metal industries' transformed into the state-owned enterprises that went on to dominate Taiwanese manufacturing in the early postwar period.[172]

13 Development Dances to the Drums of War

Though begun as combative attempts to catch up to British industrial dominance, most of these developmental projects would only come to fruition through their defeat and incorporation as subordinate elements of the new economic empire established by the Americans. After decades of war and depression, there was no ambiguity about which faction of capital had emerged victorious. By 1945, US interests 'controlled half the globe's manufacturing capacity, electrical power, and monetary reserves, owned two-thirds of its gold stocks, and produced two-thirds of its oil. By 1948, the United States controlled 48 percent of world trade.'[173] But the end of open military rivalry between competing industrial interests was not followed by a commensurate calming of class conflict. Across Asia and Africa, rebellions against the old colonial powers began to build into a new wave of revolutionary struggle. Meanwhile, in both Japan and the US, the end of the war was followed by a surge of massive strikes in which communist labour organisers played central roles. And, in Europe, the Soviet-aligned partisans who had led armed resistance to the Fascist powers now helmed mass parties with powerful electoral showings and enormous bases in the trade unions. To confront the spectre of communism, a new project of 'global development' therefore slowly came to form the ideological core of US policy. Though still clothed in the old Wilsonian language of anti-imperialism, the new American System was in fact premised on the rehabilitation of conquered competitors under military tutelage. Old imperial inequities were therefore deepened as local elites were placed back into power within restructured markets that forced them into dependence on US capital. Armed and incentivised to suppress communism, it was these local elites – now part of an increasingly transnational Pacific ruling class – who would lead the next wave of developmental states.

171 Leung 2021a.
172 Ho 2007.
173 Kiernan 2017, p. 397.

Following the communist victory in the Chinese Civil War and the subsequent US defeat in Korea, military-industrial development in the Pacific Rim would become central to the new American System. Enormous amounts of US aid were funnelled into reconstruction efforts in Japan, South Korea, and Taiwan, and into anti-communist military campaigns across Southeast Asia. The economic impact was substantial, far exceeding the funds that had been available for developmental projects prior to the war. In South Vietnam, for instance, the dictatorship of Ngô Đình Diệm received some 444 million USD in military aid and 1.4 billion USD in economic aid between 1954 and 1960.[174] In Thailand, more modest injections of aid were indispensable sources of funding for the military, which facilitated marketisation, spurred agrarian settlement of the upland jungles, and helped to revive the power and image of the monarchy in the face of a communist insurgency in the North. These local developmental states were therefore resurrected under the auspices of the larger US project of containment and remained in a largely subordinate position. At best, countries like Japan and France were allowed to operate as higher-order sub-imperial powers within their old regions of influence, joining the US to form what world-systems theorists have referred to as a 'condominium of core states.'[175] Meanwhile, postwar reconstruction, military build-up, and the more general expansion of capitalist society into new frontiers provided lucrative contracts for established industrial firms attempting to find their footing as wartime guarantees receded and powerful trade unions flexed their muscle.

From the very beginning, then, the new American System was somewhat deceptive, with its human face of democracy, prosperity, and the dismantling of the old colonial empires disguising the more monstrous visage of authoritarian anti-communism deployed in the service of US multinationals. This duality was represented on the political stage by figures such as Harry Truman and within intellectual circles by thinkers like Walt Rostow, whose name would soon become synonymous with the discipline of development economics. In concrete terms, the Truman administration oversaw the Marshall Plan, which offered a massive aid package to reconstruct Europe, and the Point Four Program, which provided a more modest package of technical assistance to countries across the Global South. At the same time, the Truman Doctrine came to be shorthand for the policy of containment, with his administration leading the invasion of Korea, launching large-scale military support for the French war in

174 Kiernan 2017, p. 404.

175 Chase-Dunn, Christopher, and Hall, Thomas D. 2008 'East and West in World-Systems Evolution', *Institute for Research on World-Systems Working Paper*, Number 42. https://irows.ucr.edu/papers/irows42/irows42.htm

Indochina, and continuing to back the Nationalist dictatorship in Taiwan even after the latter launched a brutal campaign of white terror across the island. Within the intellectual sphere, Rostow's theories followed the same two tracks:

> … on the one hand, Rostow was a major apostle of the virtues of capitalist industrialization and an architect of policies to foster this in the Global South through economic aid programmes; on the other hand, Rostow was a major propagandist for aggressive military confrontations with Communism and an architect of Vietnam War policies.[176]

Though seemingly contradictory, the two sides of the new developmental paradigm make perfect sense when framed within the larger context of class conflict. After all, Rostow's own magnum opus – titled *The Stages of Economic Growth: A Non-Communist Manifesto* – was first and foremost a political polemic. Development and dictatorship always work together as the carrot and stick of class rule.

As economic geographer Jim Glassman argues, this new developmentalist paradigm laid both the discursive and material foundations for the emergence of a Pacific ruling class centred on US interests but not reducible to them. The project advocated by figures like Rostow and Truman was therefore not simply a new model of national development, as in the original American System, but instead a form of 'authoritarian anticommunist developmentalism' ultimately deployed in the service of 'a unified, transnational class project.'[177] In other words, the great god development had now become the patron of US hegemony. Ironically, however, this new project of global development would be driven by many of the same old developmentalists in places like Japan, where the influence of Kenkoku alumni and affiliated colonial administrators would become even more pronounced in the postwar period:

> The Japanese technocratic planners who worked in Manchukuo likewise returned to serve in the highest levels of government and economic and planning bodies in Japan after the war. They led Japan's Liberal Democratic Party, which governed uninterrupted from 1955 to the 1990s. The most prominent among these was Kishi Nobusuke, who was once Manchukuo's economic tsar and among the most ruthlessly anti-Chinese and imperialist of its political leaders. His postwar position as America's man

176 Glassman 2019, p. 564.
177 Ibid.

in Tokyo allowed him to become prime minister from 1957–60 and retain prominence as an elder statesman until the 1980s.[178]

Though defeat in the war had seen Japan stripped of its imperial ambitions, its subsequent economic revival under US military tutelage was nonetheless conducted by many of the same technocrats, who were now tasked with emulating their original developmentalist program in the absence of overt colonisation or military planning. In one of the many strange circles etched within the flow of history, the Hamiltonian project, transmitted to Japan via Europe, was now allowed to bloom across the Pacific under the patronage of a US state far more powerful than even the most zealous of Federalists could have ever envisioned.

The postwar boom was, in many ways, a more refined version of the imperial developmentalism that had preceded it. Japan gave up its colonies, but Japanese firms soon came to occupy similar market positions vis-à-vis poorer countries in the Pacific, which first supplied raw materials to Japanese manufacturers and later competed to attract the industries that Japan offshored as labour costs rose.[179] Meanwhile, most of these firms were simply restructured versions of the same *zaibatsu* monopolies that had profited from colonial ventures in places like Manchuria and Taiwan. The new monopolies (now known as *keiretsu*) 'linked huge corporations in every major industrial sector into a loosely knit group with a main bank and trading company at the centre,' allowing them to amplify their power over production: 'During the heyday of Japanese global success in the 1980s, six horizontal *keiretsu* and ten additional vertical *keiretsu* formed the organisational core of the Japanese economy and controlled much of … Japan's manufacturing capacity and most of its manufactured exports.'[180] Nonetheless, these monopolies remained intensely competitive, with firms fighting over market share and control over new product lines and new industrial technologies being introduced (at least initially) from the US.

With the old fixed capital sunk into colonial industries written off by the war, these monopolies were also free to sink enormous amounts of money into new facilities: 'Japanese private investment in plant and equipment increased

178 Leung 2021a.

179 It is no coincidence that the very model of 'flying geese' industrialisation that was popularised in the latter twentieth century was originally formulated by the economist Kaname Akamatsu in the 1930s, becoming central to the Greater East Asian Co-prosperity Sphere developmental project, which was used to justify Japanese colonisation throughout the region.

180 Hamilton and Kao 2018, p. 103.

in real terms as fast as 22 per cent on annual average in 1956–73, more than twice as fast as the real growth rate of GDP.'[181] As in the Chinese banking system today, financing beyond the scope of retained profits was made possible by a large pool of household savings, which 'was centralised by the banks and other financial institutions … and was continuously channelled into loans for industrial investment in plant and equipment with relatively low rates of interest.'[182] Nearly half of the funds for new plant and equipment came from these sources.[183] Meanwhile, the enduring influence of developmentalism was visible the Japanese state's large public spending on infrastructure, its active role in industrial planning via institutions such as the Ministry of International Trade and Industry, and its steady provision of cheap credit to the major conglomerates. State spending was a crucial part of this, with government expenditures as a share of GDP rising from 19.3 percent in 1970 to 32.2 percent in 1980.[184]

The result was the first of several 'economic miracles' in Asia attributed to a new form of 'developmental state.' At first, domestic consumption and savings were central to growth, with US military procurement contracts during the Korean War providing crucial infusions of capital and technical expertise.[185] But soon the model came to be associated with export production, as direct state support became less necessary and Japanese firms secured greater shares of the global market in manufactures: 'Between 1957 and 1973 the Japanese share of all exports of manufactured goods in the world market increased from 5.5 percent to 11.5 percent …'[186] Over the same time period, manufactures also became increasingly central to global trade itself: 'In 1950 the value of manufacturing trade was only half that of the global trade in resources; by 1973 it was two-thirds greater.'[187] The boom therefore produced the first string of major new territorial industrial complexes in postwar Asia, stretching along the coast from the Tokyo megacity – also host to one of the first container shipping terminals – to the port of Kobe in Osaka, which was the busiest container port in the world until it was alternately displaced by Hong Kong, Singapore, and Busan beginning in the 1980s. And, as in its American and Bismarckian precedents and its contemporary Chinese antecedent, this devel-

181 Itoh 1990, p. 157.
182 Itoh 1990, p. 158.
183 Itoh 1990.
184 Mattick 2011, p. 57.
185 Glassman 2018, pp. 194–7.
186 Chuang 2019a.
187 Panitch and Gindin 2012, p. 114.

opmental burst spawned complaints among other wealthy nations of 'unfair' collusion between the state and the revived industrial conglomerates, laying the groundwork for the trade war that would end with the Plaza Accord and the Japanese collapse.

14 Desert Power

The loss of Japanese colonies and the liquidation of the Japanese armed forces did not, however, mean that the project lost its military dimension. In fact, the postwar period saw an even more thorough militarisation of the world at large and the Pacific in particular, which was soon covered in US bases and naval battalions. As anticommunist wars raged throughout Asia, US military procurement contracts and various forms of direct aid provided crucial sources of funding, training, and technological access for nascent capitalist interests. Meanwhile, just as the British state had helped to channel the flow of technical change toward steam power and laid the foundations for a new geography of global production on the scaffold of the railways, so too did the American state help sculpt new fundamental technologies and implant the new infrastructures that would undergird yet another era of 'globalisation.' Oil was central to this effort. Prior to the war, the US was already the world's largest oil producer, with fields in Texas and California generating roughly two-thirds of the global supply. But, in the San Remo conference after WW I, British colonial interests (backed by the French) had mostly excluded US firms from building out further capacity in the former Ottoman territories with proven reserves, thereby throttling the international expansion of US oil interests. At the time, the Anglo-Iranian Oil Company (later to become BP) was the dominant player in the region, and, since its oil was deemed vital to the empire, the majority of shares were owned by the British government.

Locked out of the core of the Middle Eastern market by 'the power which sways the sceptre of commerce and industry,' US firms were only able to secure marginal concessions. The most serendipitous of these was granted to Standard Oil California (SoCal, later Chevron) for unproven reserves in Bahrain, a tiny island off the Eastern coast of the Arabian Peninsula. When Bahrain proved a moderate success, SoCal became interested in the prospect of greater reserves on the mainland, where the ruler Abdulaziz Ibn Saud had only recently unified warring tribes into the Kingdom of Saudi Arabia. The new Saudi government desperately needed cash to bolster its stability, so it invited SoCal representatives to negotiate for a concession, which was granted in 1933 and, reflecting the hegemonic order of the time, ultimately paid out in British pounds. Over the

course of the decade, SoCal surveyed, struck oil, and built out capacity on the peninsula, partnering with Texaco – which controlled a number of refineries in Africa and Asia designed to process the particular grade of crude oil found in the new wells – to found the California-Arabian Standard Oil Company (Casoc). To expand production after WW II, Standard Oil of New Jersey and Standard Oil of New York (both later wrapped into ExxonMobil) also bought into the venture, renaming Casoc the Arabian American Oil Company (Aramco).[188] By the 2020s, Aramco would rank among the world's wealthiest companies. But it began as a relatively small and largely peripheral venture, propped up in the deserts just beyond the border of the British Empire.

After WW II, Aramco found itself positioned at the centre of a new triangular relationship that arose between the US, Europe, and the Middle East:

> … by extending, especially through the special relationship it established with the Saudi Arabian ruling class, the foothold the US had previously obtained in Middle East oil production under the 'Red Line Agreement' of 1928, the American state assumed responsibility for overseeing the international oil companies' control of 'the richest prize in the world in the field of foreign investment.'[189]

This oil was then fed into Europe, where it both fuelled reconstruction and formed the energetic basis for postwar industry, with 85 percent of Europe's oil coming from the Middle East as early as 1950.[190] As the British empire finally collapsed, the new US-Saudi oil regime also became the basic axis of postwar imperial power. Though the initial Saudi concession was granted in pounds, the booming trade after the war would be denominated in dollars, with these 'petrodollars' often being funnelled back into US Treasury debt and other US assets, helping to reinforce the dollar's status as the global reserve currency.[191] The Saudi connection became even more crucial when US reserves began to decline, with oil production in SoCal's home state of California hitting a plateau as early as the 1950s and US crude production peaking in 1970 – only recovering to similar levels after the fracking boom in the 2010s.[192]

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188 This history is detailed in: Wald 2018.

189 Panitch and Gindin 2012, p. 103.

190 Ibid.

191 For a review of the basic relationship and its slow transformation after the Great Recession, see: Tooze, Adam 3 May 2023 'Chartbook #212 The end of the petrodollar? How macroeconomics may compound geopolitics in shaping the future of the dollar system', *Chartbook*. https://adamtooze.substack.com/p/chartbook-212-the-end-of-the-petrodollar

192 California data is laid out in: Brandt 2011, pp. 1833–54; National data on US crude produc-

But this local decline occurred in the midst of a more general boom, marking a fundamental shift in the energetic basis of the planetary factory. Crude oil would surpass coal in total share of world primary energy supply by the 1960s – slightly sooner if natural gas is included.[193] Oil was equally central to the expansion of a wide range of new product lines. These included the obvious cases such as the auto and aerospace sectors but also an entire array of new petroleum products that revolutionised both manufacturing and agriculture, visible in the spread of plastics and hydrocarbon-dependent fertilisers throughout the world. Within the US, this drove the rapid expansion of new industrial territories such as the petrochemical corridor along the southern stretches of the Mississippi River in Louisiana, as well as new administrative centres for the global oil industry in places such as Dallas. Both the petroleum industry itself and these affiliated product lines would then reshape the basic time and space of production. New infrastructures designed around the movement of cars, planes, and transcontinental ships allowed for ever-larger urban agglomerations that were also further dispersed from one another.

Similarly, the union between the petrochemical and agribusiness sectors placed Midwestern multinationals such as grain giant Cargill and agrochemical firm Monsanto in leading positions within the global green revolution. As Moore argues, the rapid capitalisation of agriculture in this period 'was made possible by an extraordinary alchemy: turning oil and natural gas into food.'[194] Petroleum-based fertilisers and farm machinery – combined with other agroscientific advances in the breeding of staple grains – enabled a series of massive agroecological transformations, with formerly inaccessible or inadequate land now able to sustain cash crop plantations. In this capacity, the profit imperatives of these increasingly centralised monopolies became important forces resculpting the patchwork family farms of the US Midwest into an increasingly undifferentiated corn belt while also reshaping land use at the global scale, as new waves of agrarian settlement and deforestation radiated out from bustling populations centres in the Global South. In both established agricultural regions and these emerging agrarian belts in the poor countries, the green revolution also saw a rapid decline in the share of non-market inputs and subsistence farming. In the US itself, 'the share of purchased inputs more than doubled, while non-market inputs declined by over half, in the decades after

tion from 1920 to the present is available from the US Energy Information Administration: https://www.eia.gov/dnav/pet/hist/LeafHandler.ashx?n=PET&s=MCRFPUS2&f=M.

193 Smil 2017, p. 396, Figure 7.3.

194 Moore 2016, p. 251.

1935,' leading to 'a rapid shake-out of uncompetitive farmers,' centralising production such that 'by 1969, 219,000 farms – the top seven percent – produced nearly 53 percent of total output.'[195]

The introduction of hybrid corn varieties in the mid-1930s both produced rising yields and enabled these increasingly powerful agricultural conglomerates to sever 'the age-old connection between seed and grain … [b]y crossing inbred lines of maize whose seed produced high yields but could not be reproduced' and therefore had to be purchased annually by farmers from wholesalers. The 'core synthesis' of the green revolution thus 'brought together the nineteenth century's dynamic family farm model with hybrid corn (maize), the biological pivot of a new property regime.'[196] Once the sector was thoroughly capitalised, yields skyrocketed and the need for human labour fell drastically: 'Labour inputs fell by more than two-thirds, and mechanization rose 213 percent, between 1935 and 1970. Meanwhile fertiliser and pesticide inputs increased by an extraordinary 1,338 percent.'[197] This rapid increase in agricultural productivity both enabled the production of sufficient food for the new mega-urban territories that formed in the wake of WW II and encouraged the migration of now-redundant rural workers to the cities.

Meanwhile, oil was also quite literally the fuel of the global military complex and remains so today, with the US Department of Defence long accounting for the bulk of US government fuel consumption and often holding the seat of largest single energy consumer in the world. This military complex was crucial in launching early logistics technologies and in financing the construction of basic infrastructure, especially in Asia.[198] Both domestically and internationally, much of this new infrastructure was constructed by US firms, often operating arm-in-arm with the state. Mirroring the role played by British railroad contractors in the Victorian era, beginning in the Depression and continuing after the war, a new generation of US construction contractors were integral to the buildout of urban centres and new infrastructural projects within the continental US – including a series of massive hydropower dams, the construction of major levee systems in flood-prone areas, a massive expansion of electrical utilities, and the final expansion of the Interstate Highway System – and to the (re)construction of urban-industrial complexes in postwar Europe and Asia.

195 Ibid.
196 Moore 2016, p. 250.
197 Moore 2016, p. 251.
198 Arroyo and Bélanger 2016, pp. 50–69.

Major multinational construction corporations like Bechtel emerged from the fusion of smaller contractors that had arisen in the early 1900s building dams, canals, railways, and roads across the Western states on government contract. Equally important were firms involved in the construction of early oil infrastructure, with the Fluor Corporation getting its start building refineries in California and Bechtel taking on pipeline contracts for Standard Oil. These firms existed in close symbiosis with the state, with one of the three companies that would fuse to become Bechtel founded by two former US Reclamation Service employees and many of the major road building contracts between WW I and the Depression funded by the government but built by private contractors, with the pooling of capital through state agencies helping highway projects to become 'an increasingly significant and capital-intensive sector of construction.'[199] Such companies were therefore well positioned to win major New Deal construction contracts and, in order to meet deadlines and keep costs down, the firms in charge of such projects deployed brutal company-town models with the support of government-backed strike breakers.[200]

WW II then provided the impulse for the internationalisation of these construction conglomerates alongside massive state investment in US industry more broadly. The scale of these contractors' involvement was comparable to that of the British railway contractors a century prior: 'Of World War II military construction projects valued at $2.4 billion, U.S. firms performed half in countries of the British Commonwealth. They carried on a further tenth in Latin America …' These were the firms that won the contracts to build the Pacific Naval Air Bases. They conducted projects in the Philippines, Canada, Brazil, Mexico, and Venezuela. Crucially, firms like Bechtel were also often the ones actually constructing the oil infrastructure that would soon fuel much of the planetary factory, with the company 'building petroleum refineries for Shell, Caltex, and Aramco in Curacao, Bahrain, and Saudi Arabia respectively as well as the large Canol military pipeline and refinery project in northwestern Canada …'[201]

Various forms of direct state funding and indirect provision were obviously central to the process: 'in 1946–47, businesses purchased construction machinery from government surplus asset stocks valued at $271 million – a sum almost equal to the capital assets less reserves of construction corporations in 1944.'[202] They then used these stocks to secure postwar contracts fun-

199 Linder 1994, p. 120.
200 Linder 1994, pp. 122–24.
201 Linder 1994, p. 126.
202 Linder 1994, p. 127.

ded through the Mutual Security Agency, which 'provided privileged access for U.S. firms in Pakistan, Iran, Turkey, and other Asian and Middle Eastern countries,' with separate trade agreements facilitating similar access to markets in the Philippines and the outbreak of the Korean and Vietnam Wars providing another series of lucrative contracts.[203] Meanwhile, their dominance in the oil industry allowed these conglomerates to expand into the chemical market, with US firms accounting for 'almost two-thirds of the value of world export contracts for chemical, oil, and gas plants' from 1960 to 1966.[204] These lines of business became increasingly crucial as the subsequent economic booms in Japan and West Germany saw cheaper challengers emerge to take on increasingly more complex construction and engineering contracts, thereby displacing US construction companies from the lower end of the international market – a pattern that would be repeated in the ascent of South Korean and then mainland Chinese firms to the forefront of the global construction industry in subsequent decades.

Just as the laying of railways helped to tilt capitalist society's centre of gravity in the nineteenth century, these new infrastructural systems would determine the Pacific tilt of production in the twentieth. The military-industrial nexus was again central, with technologies such as containerisation and advances in the science of logistics essentially offshoots of military provisioning systems: 'The U.S. military played a key role in the development of just-in-time techniques, first through the training of workers in occupied Japan to meet U.S. procurement needs and then by diffusing these techniques through contracting for Korean War supplies.'[205] The shipping container itself was a military invention, standardised through its use in the Vietnam War. Combined with computerisation and refined via the emerging internet – which was yet another invention nursed by military funding – these advances laid the technical and logistical groundwork for the entire series of new territorial industrial complexes that would be strung like concrete jewels along the East Asian coastline by the turn of the century. Even though many of the subsequent economic booms were driven as much by speculation on inflated asset prices as productive investment, they nonetheless produced industrial territories that bore their own inertia, much like the railway and streetcar systems of North America. This inertia then allowed these territories to not only survive subsequent crises but also to be reborn through them, often growing more central to global production after the dust cleared.

203 Linder 1994, p. 128.
204 Linder 1994, p. 134.
205 Cowen 2014, pp. 30–31.

Military interests also stimulated an unprecedented wave of investment within US manufacturing itself. Throughout the late nineteenth and early twentieth centuries, a number of cutting-edge technologies had emerged, been patented, and then been refined, but firms had generally lacked the capital, market confidence, or proper infrastructure to roll them out at scale. Mass electrification and intensive military investment changed this, driving new advances in fundamental research and providing a means through which firms could implement the backlog of new technologies that had accrued over previous decades in emerging fields such as automotives, aeronautics, and electrical machinery.[206] Meanwhile, state support for further technological advances only grew, with 'US expenditure on research and development [in the 1960s and '70s] about four times that of the countries of Western Europe combined.'[207] The US was therefore able to mobilise a distinctive combination of amenities – such as the integration of research universities with the private sector and a particularly strong 'base of skills in engineering, optics, chemistry, and metallurgy' – to ensure that American companies retained their controlling positions within emerging global supply chains.[208] Combined with the financial dominance of the dollar, this then had the effect of pulling larger and larger sums of foreign investment *into* the US, even as American multinationals led in FDI elsewhere.

Of all these factors, however, the centrality of Cold War class struggle to the new mythos of 'Global Development' meant that the military dimension of the American System would always remain decisive. Just as the Civil War had once helped to accelerate US industry out of its infancy, research originally funded for potential military deployment against the USSR soon proved crucial to the theoretical advances in the natural sciences that would then enable the entire range of technologies associated with the 'fourth industrial revolution,' the most important of which was the semiconductor: 'it was ion implantation, a technique that emerged from nuclear physics after the 1970s, that enabled integrated circuits to develop their potential in full and qualitatively transform industrial technologies.'[209] Similarly, the microchip itself was only developed through military means, with contracts for the Apollo program and the Minuteman II missile (the first guided by a computer) forming more or less the entire foundation for the early semiconductor industry. Ascendant industrial centres in places like Hunstville, Alabama and Palo Alto, California were nursed on

206 Gordon 2016, pp. 555–61.
207 Panitch and Gindin 2012, p. 147.
208 Ibid.
209 Arboleda 2020, p. 50, footnote 61.

these defence contracts, which then allowed local firms to gradually expand into consumer markets.[210] Behind the mythos of the entrepreneur operating from a garage in Silicon Valley lay the reality of the missile scientist running a lab on a university campus with money from the Department of Defence.[211]

15 The Vanguard of Development

As the Japanese boom gave way to an unprecedented bubble and investment turned elsewhere, the next generation of developmental states took shape across Asia and new sub-imperial powers began to emerge outside the 'condominium of core states.' In part, these booms were driven by Japanese investment and inspired by the Japanese model. The closest emulator was South Korea, where a government-controlled banking system was linked to the rise of the *chaebol* conglomerates, which set preferential pricing for their subsidiaries even while they engaged in intense competition between one another for market share. In fact, many of these *chaebol* quite literally traced their origins to the Japanese colonial period, with some beginning as Japanese-Korean joint ventures.[212] Like the *keiretsu* in postwar Japan, the *chaebol* came to exert an outsize influence over South Korean manufacturing: 'In 1985, the five largest *chaebol* controlled over 50 percent of all Korean exports, nearly 50 percent of all manufacturing sales, 10 percent of the total labour force, and about 30 percent of the value added in manufacturing for the entire South Korean economy.'[213] Because of this, South Korea would come to be seen as something like the prototypical 'developmental state' in the era of globalisation, at least until its fall from grace during the Asian Financial Crisis.

But it was the case of Taiwan that would exert the greatest influence on the subsequent industrialisation in mainland China and, arguably, on the structure taken by global supply chains in the era of globalisation. Developmental policies on the island had subsisted in various forms throughout the period of Japanese occupation and civil war but would only be fully revived after the Nationalist retreat in the late 1940s, when planners began to implement a program for rapid industrialisation based on Listian principles, as inspired by the subsequent examples offered in Japan (transmitted via Kenkoku) and the Soviet Union (via Whampoa), and informed by the abject failure of both the

210 Miller 2022, pp. 29–32.
211 For a history of the Silicon Valley industrial complex, see: Harris 2023.
212 Kohli 1994.
213 Hamilton and Kao 2018, pp. 104–5.

more traditionalist and the more liberal economic policies that had been pursued by the party on the mainland. Initially, the case of Taiwan seemed similar to that of South Korea, with development overseen by a military dictatorship and helmed by large conglomerates with direct ties to the state bureaucracy. As in the case of South Korea (and mainland China, for that matter), much of island's postwar manufacturing capacity in heavy industry existed in the form of facilities seized from the Japanese. Similarly, their management under the new conglomerates was intended to serve both economic and military purposes.

After all, the 'Republic of China on Taiwan' was inaugurated by the February 28 massacre of 1947, in which the Nationalists slaughtered some 20,000 civilians in response to a popular uprising. The massacre was then followed by a decades-long campaign of white terror that saw thousands sentenced to death, more than 100,000 imprisoned, and many killed via extrajudicial means. This brutal military dictatorship was upheld, in part, due to material and diplomatic support from the US, for which Taiwan served a crucial role as an 'unsinkable aircraft carrier' helping to contain the communist threat on the mainland. Similarly, the Nationalist developmental schemes were nursed on US government aid and procurement contracts. Though the opening of China in the 1970s would change this calculus, with direct military aid flows drying up, Taiwan would nonetheless retain its protected status. The period of martial law, declared in the spring of 1949, would be ended only in 1987. Special prosecution powers for 'anti-state' activity remained in force until 1992. These were the conditions in which the bulk of the developmental boom would occur.[214]

However, prefiguring later industrialisation on the mainland, the Taiwanese boom differed from that in South Korea and Japan in its dual-track character, with large, cartelised and often state-owned conglomerates flourishing alongside the hyper-competitive SMEs crowding into the private sector. Taiwan's export industry was also more reliant on FDI (primarily from the US and Japan), meaning that many downstream firms were thoroughly integrated into and dependent upon global supply chains from the very beginning. The spectacular growth of these downstream SMEs would see Taiwan rendered in the economic press as a hallmark of liberalisation despite the fact that upstream industries providing raw materials to the export assembly hubs were dominated by large conglomerates that were either heavily subsidised or owned outright by the

214 For a concise overview of the island's geopolitical history, see: Lin, James 18 November 2022 'Taiwan Shouldn't Be Used as a Geopoltical Pawn', *Jacobin*. https://jacobin.com/2022/11/taiwan-geopolitical-pawn-china-us-international-relations-cold-war-history

state and operated according to an industrial policy formulated by government planners. In addition to its control over upstream conglomerates, the Nationalist dictatorship guided land reform and agricultural modernisation, helping to trigger a green revolution that increased productivity and thereby fed more workers into urban industrial production.[215] In fact, Taiwan even sent specialized international aid teams to encourage agrarian reform in places like South Vietnam and to countries across Africa. The anti-communist language of these programs explicitly mirrored that of Rostow, portraying the Republic of China on Taiwan as the 'vanguard' of capitalist development.[216]

As in the US, Germany, and Japan before it, Taiwan also made use of active protectionism to shelter emerging industries in the early stages of industrialisation, with 'import, foreign exchange, and licensing controls … introduced by the government to salvage small establishments from extinction and to ease the critical balance of payments situation,' thereby laying the groundwork for the subsequent export boom.[217] Meanwhile, extensive economic interventions were conducted to ensure the stability of the dictatorship, including a complex system of food requisitioning via state-owned monopolies:

> The government controlled all fertilizer imports and manufacturing and monopolized its distribution to local farmers associations. Farmers who required fertilizer needed to pay for it not with New Taiwan dollars but rather with rice from their own annual production. This rice was then passed from the farmers' associations back to the state.[218]

In this period, outright state ownership was so central to Taiwanese production that it was common for the system to be referred to as a form of 'bureaucratic capitalism,' similar to that of mainland China today: 'In 1952, as much as 56% of total industrial production … as well as 56% of manufacturing output, were accounted for by public corporations.'[219] In certain sectors, the state was essentially unchallenged, 'with 100 percent ownership of electricity, gas, and water facilities.'[220]

While these policies were subsequently relaxed, the government nonetheless deployed cartel powers to ensure the cheap supply of upstream goods and

215 Lin 2015.
216 Lin 2025.
217 Amdsen 1979, p. 364.
218 Lin 2025, p. 87.
219 Amdsen, p. 367.
220 Hamilton and Kao 2018, p. 107.

'offered both local and foreign exporters an impressive battery of incentives.'[221] As time went on, outright state ownership also evolved:

> on the one hand, in some new industries (e.g. plate glass) the government, as in Japan, has built new factories which, once in the black, have been transferred to private owners. On the other hand, in industries deemed essential for industrialization but in which private capital has been reluctant to invest, the government has stepped in.[222]

By the 1970s, though the overall share of state ownership had fallen, 'the government remain[ed] dominant in such fields as heavy machinery, steel, aluminum, shipbuilding, petroleum, synthetics, fertilisers, and last but not least, banking' with 'almost all banks in Taiwan … wholly or partially owned by the state,' and the government accounting 'for as much as 40% of gross domestic investment in 1972 …'[223]

The monopolies that populated these upstream sectors were run in a similar fashion to mainland group companies today, with state-owned companies such as the Chinese Petroleum Corporation operating alongside and in competition with a new generation of vertically-integrated private conglomerates such as the Formosa Plastics Group, which had been founded when patriotic businessman Wang Yung-ching used his connections within the Nationalist Party to access limited USAID funding to open a PVC factory. Former landowners dispossessed in the land reform were repaid in a similar fashion, with the government gifting them shares in large conglomerates such as the Taiwan Cement Corporation – though most made the mistake of selling off these shares soon after.[224]

As the importance of USAID funding to the founding of Formosa Plastics suggests, in Taiwan as in Japan and South Korea, development was inextricable from Cold War politics. The transnational hierarchy of the emerging Pacific ruling class was equally visible:

> In electronics, for example, the first Taiwanese electronics firm, Tatung, had signed a technology agreement with Japan in 1953, funded by USAID, but the Taiwanese industry remained weakly developed for many years after this, with only seven Japanese-Taiwanese joint venture agreements in place by 1963. In 1964, however, as the US military ramped up its pro-

221 Amdsen, p. 365.
222 Amdsen, p. 368.
223 Amdsen, p. 369.
224 Hamilton and Kao 2018, pp. 108–9.

> jects in Vietnam, the US company General Instruments opened production in Taiwan, and by 1965–6 … more US and Japanese capital began to flow in, especially for export-oriented electronics assembly.[225]

Though the private sector would soon occupy the spotlight as export production took off, the Taiwanese state remained extremely active behind the scenes, modelling its own research and planning policies on the military-industrial example of the US.

The government established programs to attract leading engineers from new centres of industrial research in places like California and Texas while also assisting the SME export hubs in their efforts to win contracts from Japanese firms shedding their lower-end product lines. State investment in reproductive infrastructure had also ensured that manufacturers had access to cheap, well-educated labour sustained by high levels of literacy and an intensive system of technical schools. In the Kaohsiung Export Processing Zone, for example, foreign firms were 'promised tax exemptions (no corporate tax for the first five years); inexpensive land, power, and water; duty-free status for all imported raw materials and parts and for all exports; and the ability to repatriate profit and capital.'[226] Founded in 1966, Kaohsiung was the first in a global constellation of new free trade zones where local laws and taxes were eased to help smooth the flow of capital inward and increase the volume of value pouring back out. These Taiwanese precursors also served as direct inspiration for the series of Special Economic Zones founded at the end of the 1970s along China's southern coast, around which the industrial megacities of the sunbelt would slowly congeal.

To accommodate further upgrading, the government established the joint public-private Industrial Technology and Research Institute (ITRI) in 1973, tasked with obtaining 'technology transfers from American companies to manufacture integrated circuits.'[227] ITRI itself was 'the creation of a group of politicians, technocrats, and business professionals associated with Sun Yuan-suan … a trained engineer and highly successful executive at the state-owned Taiwan Power Company' who later served as the Minister of Economic Affairs.[228] Another close advisor on the project was Li Kwoh-ting (K.T. Li), who would come to be known as the 'father of the Taiwan miracle.' Born in Nanjing and trained in physics at Cambridge, Li had fled the mainland with the Nationalists

225 Glassman 2018, p. 409.
226 Gordon and Kao 2018, p. 157.
227 Gordon and Kao 2018, p. 160.
228 Gordon and Kao 2018, p. 171.

in 1948. In Taiwan, he was made president of the state-owned Taiwan Shipbuilding Corporation – which itself had originally been a colonial subsidiary of Mitsubishi Heavy Industries, one of the major Japanese *zaibatsu* – and was then appointed to serve as a planner with the Industrial Development Commission, where he had helped to design Taiwan's export zones.[229] Echoing the basic practices piloted in the US military-industrial complex, Li emphasised that ITRI was designed to act as a 'publicly funded, privately staffed platform for employing advanced technology to develop successful products' which would then 'be spun off into private companies.'[230]

Though ostensibly geared toward any high-tech product lines, Li had already been working to attract semiconductor manufacturers to the island, hoping that the sector would help to both catapult Taiwanese industry to the forefront of global manufacturing and incentivise ongoing US military protection of the island. Only a few years prior to the founding of ITRI, Li had successfully convinced Texas Instruments to open its first semiconductor plant in Taiwan.[231] By far the most successful of ITRI's projects was the creation in 1980 of the Hsinchu Science Park. Located near two national universities and the ITRI headquarters itself, the science park offered tax breaks and cheap property similar to that available in the export zones, helping to attract a number of high-tech firms, including the United Microelectronics Company (UMC) – a budding semiconductor manufacturer formed with funding from ITRI's Electronics Research and Services Organization.[232] UMC helped to anchor the park's focus on the semiconductor market. Meanwhile, Li had been gradually building contacts with members of the Chinese diaspora in the US in an attempt to recruit talent. Hsinchu Science Park was one element in this strategy, offering housing perks and high-end English-language schools for engineers who chose to relocate.[233]

Among the most important of these US-trained engineers was Morris Chang. Educated at MIT, Chang had gone on to work with Texas Instruments in Dallas, where he'd designed the firm's hyper-efficient manufacturing process and personally helped to push through the deal to open the first semiconductor plant in Taiwan. As one of the few Asian employees in a white-dominated industry, Chang soon hit a glass ceiling within the corporate hierarchy and opted instead to relocate to Taiwan on the invitation of Li, who hired him as director of ITRI and tasked him with taking lead of the domestic chip industry.

229 Miller 2022, pp. 64–5.
230 Gordon and Kao 2018, p. 172.
231 Miller 2022, p. 65.
232 Gordon and Kao 2018, p. 173.
233 Rigger 2021, p. 77.

Chang used his support within the government and his connections within the cutting-edge segments of the semiconductor industry to found the Taiwan Semiconductor Manufacturing Company (TSMC), which received 48 percent of its startup capital from the state, alongside initial investment from Philips, a Dutch firm that controlled crucial production technology and intellectual property that TSMC would need to license, as well as 'wealthy Taiwanese who were "asked" by the government to invest,' with government ministers contacting the island's wealthiest families directly to request funds for the project.[234]

Under Chang's direction, TSMC specialised in manufacturing made-to-order chips for customers. The business model was a huge success, since it allowed lead firms in places like Silicon Valley to downsize their own manufacturing facilities, spawning the era of the 'fabless' semiconductor firm. It was this innovation that would set the stage for companies like Apple to outsource the entirety of their manufacturing chain even while they retained intellectual property over both their software and their chip designs. The model was familiar, however, with TSMC set 'to be to the computer industry what Formosa Plastics was to the plastics industries: the core manufacturer of components that other firms used to make consumer products.'[235] TSMC's close links to the US were crucial, since 'most of its customers were U.S. chip designers, and many top employees had worked in Silicon Valley.'[236] Within the US and Japan, rising labour costs had already seen many firms open overseas subsidiaries, with foundries relocated to Taiwan, South Korea, Singapore, Malaysia, and other areas with cheap but well-educated labour.

This gradually reshaped the economic geography of the industry: 'By the end of the 1970s, American semiconductor firms employed tens of thousands of workers internationally, mostly in Korea, Taiwan, and Southeast Asia.'[237] Then, under the impact of TSMC's fabless revolution, the ownership structure of these firms began to change: 'U.S. fabs made 37 percent of the world's chips in 1990, but this number fell to 19 percent by 2000 and 13 percent by 2010. Japan's market share in chip fabrication collapsed, too.'[238] By the early 2020s, TSMC was making more than half the world's semiconductors.[239] Meanwhile UMC, still partially owned by the state, 'was the fourth-largest semiconductor foundry in

234 Miller 2022, pp. 166–67.
235 Gordon and Kao 2018, p. 176.
236 Miller 2022, p. 167.
237 Miller 2022, p. 65.
238 Miller 2022, p. 177.
239 Rigger 2021, pp. 69–70.

the world' in 2019.[240] Today, 'most of the world's GDP is produced with devices that rely on semiconductors' and, despite the shift of production and even high-level design toward Asia, the upper echelons of the industry remain dominated by US firms: 'almost every chip made still has a Silicon Valley connection or is produced with tools designed and built in California.'[241] Firms like TSMC and UMC therefore serve as crucial nodes sitting just below the leading tech conglomerates of the US and Taiwan itself remains a liminal power, operating at the interface between the 'condominium of core states' and the sub-imperial realm, with Taiwanese conglomerates serving as the overseers of the vast manufacturing complexes across Asia.

Soon, semiconductor assembly plants were opening in the mainland as well. In fact, an effort was even made to essentially clone the TSMC experiment. In the year 2000, the Chinese government offered its support to another high-level Texas Instruments engineer, Richard Chang (Zhang Rujing), who sought to establish one of the country's first semiconductor foundries in Shanghai. The new company that emerged from the deal, called Semiconductor Manufacturing International Corporation (SMIC), received extensive government subsidies but also raised 'over $1.5 billion from international investors like Goldman Sachs, Motorola, and Toshiba.' All in all, 'half of SMIC's startup capital was provided by U.S. investors' and many of its employees were also foreigners, including 400 recruits from Taiwan.[242] Nonetheless, the mainland's entry into the sector would soon be stifled. First, the dominance of TSMC (and soon Samsung) within the semiconductor supply chain proved difficult to shake. It would take decades for the Chinese microchip industry to even begin to catch up. Then, in the late 2010s and early 2020s, more forceful trade war measures sanctioned exports by firms such as Huawei, required SMIC to apply for extensive export licensing, and discouraged US-based chipmakers from outsourcing further production to China. Though China has since doubled down on its attempts to develop a domestic chip infrastructure, pouring even larger subsidies into the sector, these investments have not yet paid off.

Thus, although Chinese labour is still central to basically every level of the microelectronics industry and SMIC is the world's third largest contract chip producer, as of 2022, 'across the entire semiconductor supply chain, aggregating the impact of chip design, intellectual property, tools, fabrication, and other steps, Chinese firms have a 6 percent market share, compared to America's 39

240 Rigger 2021, p. 77.
241 Harris 2023, pp. xxii–xxiii.
242 Miller 2022, pp. 179–80.

percent, South Korea's 16 percent, or Taiwan's 12 percent …'[243] In necessary input sectors such as photolithography, an extremely small handful of firms – all of which are located in the wealthiest countries – enjoy absolute monopolies at crucial bottlenecks in the design process. Meanwhile, 'almost every chip produced in China can be fabricated elsewhere.'[244] Recent trade restrictions imposed by the US have been designed to keep Chinese firms in this subordinate position, highlighting the basic imperial character of the global trade hierarchy. In fact, with the entire course of industrialisation in East Asia scaffolded by US military-industrial interests, it was hardly coincidental that the resulting archipelago of integrated circuit production was essentially a mirror of the Cold War containment strategy: 'From South Korea to Taiwan, Singapore to the Philippines a map of semiconductor assembly facilities looked much like a map of American military bases across Asia.'[245] For all of these reasons, the microchip is, after money, the commodity that might be said to best symbolise the entire chain of violence constituting the imperial order, compressed onto a thin slice of silicon.

16 The Dictatorship of Capital

Much as in the UK and US, these subsequent developmental states were also shaped at every turn by a series of violent class struggles. Japan's successful pivot to export production under US military patronage only occurred after the occupation government suppressed the massive union movement that its own postwar democratisation policies had unintentionally unleashed. In 1947, a general strike led by left-wing labour unions demanding the establishment of a minimum wage was crushed by the US regime. In response to ongoing labour agitation, the occupation government then imposed Taft-Hartley-style labour regulations in 1949 and purged communists from the unions in 1950.[246] These 'so-called "red purges" … attempted to destroy the sudden resurgence of the prewar Japanese communist tradition, once the strongest in Asia (in the 1920s and '30s) …'[247] But large labour disputes continued alongside high rates of unionisation. The Japanese Communist Party (JCP) was even briefly driven underground again and began to place 'emphasis on armed struggle, under-

243 Miller 2022, p. 249.
244 Ibid.
245 Miller 2022, p. 66.
246 Hoston 1986, pp. 252–5.
247 Walker 2020, pp. 4–5.

ground clandestine work, and a renewed proximity to the Chinese line' from roughly the late 1940s to 1955.[248] Soon after, however, it followed the path of Communist Parties in Europe, expelling those who advocated for revolution and pursuing a compromise that would pave 'the way for the JCP's full transition to reformism and participation in the government.'[249]

With more radical opposition tamed, a substantially more conservative set of labour institutions was then implemented, providing the basis for rapid increases in productivity and a stable source of labour for the revived industrial conglomerates. What came to be known as the 'Japanese style of labour management, which is based upon the lifetime employment system and a wage system based on seniority, was generalised among Japanese big businesses as a compromise with such militant labour movements in this period.'[250] Crucially, this system also instituted tiers in access to unionisation, with only formal workers and skilled employees at large businesses included in the new compromise. This was 'actually a more suitable system for Japanese big businesses, particularly in heavy industries, continuously to secure the necessary, increasing numbers of experienced adult male workers at their central workplaces … It enabled big businesses to exploit workers in a segmented wage system, to utilise relatively low wages of regular young workers, irregular employees, and many workers in small and medium firms under sub-contracting systems.'[251] By the time mass mobilisations revived in the 1960s, they followed the pattern of New Left protests in places like Europe and North America, with their organising cores forming among students, rather than industrial workers.[252]

Elsewhere in the region, class struggles were inextricable from more general protests against local military dictatorships. South Korea offers the most incendiary example, with the new workers' movement ignited on 'November 13, 1970, when Jeon Tae-il, a young textile worker, immolated himself at a small demonstration in one of Seoul's sweatshop districts.'[253] The 1970s then saw an increasing number of strikes, which soon meshed with an even broader student and 'popular culture' movement demanding the end of military rule. The peak, however, came in May of 1980, when the army fired on a demonstration in Gwangju and, in response, the city's population rose up, raided

248 Walker 2020, p. 5.
249 Ibid.
250 Itoh 1990, p. 147.
251 Itoh 1990, p. 148.
252 See: Walker 2020.
253 Goldner, Loren 9 January 2008 'The Korean working class: From mass strike to casualization and retreat, 1987–2007', *Libcom*. https://libcom.org/article/korean-working-class-mass-strike-casualization-and-retreat-1987-2007

military armouries, and established a temporary workers' government often compared to the Paris Commune.[254] The uprising was ultimately crushed, but pro-democracy protests and strikes continued over the subsequent decade. After another wave of growing protests in June of 1987, the government finally conceded and agreed to hold elections in fear that workers might shut down production in support of the movement.

But the decision only emboldened the unions, who used the opportunity to launch a wave of strikes demanding increased pay and shorter working hours. Just as in previous peaks of the workers' movement, this very victory then brought its own defeat, reinforcing 'the illusion of the possibility of capital-labour cohabitation, and hence the reformist currents' within the rapidly growing unions. As a result, the more radical of the democratic union federations (the National Congress of Trade Unions) was quickly pieced apart and replaced by the more conservative Korean Federation of Trade Unions (KTCU). This then laid the groundwork for the KTCU to step in as mediator during the Asian Financial Crisis, 'assenting to mass emergency layoffs.' In response, the rank-and-file revolted to oust the union leadership and initiate a series of strike actions in 1998, which resulted in the imprisonment of the newly elected leaders and the defeat of the strikes. In the years after, labour only grew more casualised, with the crisis wiping out many of the smaller unionised shops and leaving the official union movement to represent a shrinking share of workers.[255]

In Taiwan, the pattern was similar, but much more subdued. Early protests and unionisation efforts in the 1940s were met with the violence of the white terror, after which the period of martial law lasted for some 38 years. During this time, very little open organising was possible. Thus, although some scholars would attribute the weakness of the Taiwanese labour movement to cultural stereotypes (such as 'Confucian docility or group loyalty'), the 'Cold War origins of the Taiwanese regime, the preponderance of small-scale, rural industry and the great ethnic divides which have been manipulated by political and business leaders on the island since 1949 provide for more convincing explanations …'[256] Even more so than in South Korea, the US-backed dictatorship was a crucial factor in keeping labour costs down and thereby making Taiwan an attractive location for private investment in the early stages of export-production. When a workers' movement did arise, it did so in the early period of democratisation in the 1980s, when 'dissident workers organised new unions or took over

254 For a detailed overview of the events in Gwangju, see: Lee et al. 2022.
255 Goldner 2008.
256 Minns and Tierney 2003.

the ones previously controlled by the ruling party [and] demanded the implementation of rights guaranteed by the Labour Standards Act, which had been enacted in 1984 but not translated into practice.'[257]

Labour agitation thus complemented but also remained subordinate to essentially civic demonstrations against the dictatorship. For precisely these reasons, the labour movement in Taiwan remained a feeble force within these larger struggles, and grew more so after democratisation. By the turn of the century, union membership had become 'an increasingly rare privilege among the better-off sections of Taiwan's working class …'[258] Echoing the example of Hong Kong, many of the reforms that were rolled out across the island were not the result of workplace organising at all but were instead implemented due to pressure from civil society, with youth activists helping to end the long wage-freeze experienced between 1997 and 2007, for example. By the turn of the century, then, the more amorphous 'social movement' seemed to have taken on many of the practical and ideological roles that the 'workers' movement' had once served in securing capital's interests via the mediation of labour.[259]

17 Blood on the Plains

The evil accumulated in the ritual circuits of capital seems always to gather itself into the shape of a state, and it is the increasing scope and strategic orientation of this state that then appears to determine the fate of development. But the encrusted evil of social practice both feeds and exceeds statecraft. Xunzi's theory of the connection between the social logic of ritual and the material nourishment of the population was, not coincidentally, formulated in an era of growing state power, with the fragmented kingdoms of the Warring States submitted one by one as the western kingdom of Qin spread eastward across the blood-soaked fields of the Central Plain. The last of the states to be conquered was Qi, home to the prestigious Jixia Academy where Xunzi had both studied and taught. And among his students at the academy was one Han Feizi, known for synthesising the thought of the *Fajia* (often translated as 'Legalist' school),

257 Ho Ming-sho 6 December 2022 'Taiwanese Workers Have Shown Us How to Gain Ground in the Neoliberal Era', *Jacobin*. https://jacobin.com/2022/12/taiwan-workers-unions-civil-society-social-movements

258 Ibid.

259 These are all, of course, much too succinct summaries of complex political sequences, each of which was marked by all the hope, violence, betrayal, and of course the long, sad, aftermath that attends the drama of class conflict in any locale.

which had helped to structure the Qin state both before and after its imperial conquest. In contrast to the amorphousness of ritual practice conducted by sage elites, *Fajia* thinkers emphasised the importance of an efficient state bureaucracy populated by competent officials operating according to clear standards, overseeing a population governed under a principle of equality before the law, and all enforced through a harsh system of punishments. Though this project would later be portrayed as fundamentally opposed to Confucianism, Xunzi was himself a more syncretic thinker, both influenced by earlier *Fajia* philosophers and serving as a direct influence on his student, Han Feizi, the great synthesizer of *Fajia* thought.

This more complex lineage can be traced in the figure of Shang Yang, an earlier *Fajia* philosopher (writing about a hundred years before Xunzi) who had served as a reformer and advisor to the state of Qin, where he helped to lay the economic and administrative foundation for its imperial expansion. Though Shang Yang disregarded elite-led ritual in favour of a bureaucratic political project geared toward 'enriching the state and strengthening the military,' he preceded Xunzi in identifying the importance of what we might think of as a primitive form of military-industrial power, proposing 'a set of measures that singularly focused on encouraging agricultural production and participation in the military …'[260] But Shang Yang was not quite a developmentalist, since the point of bolstering agricultural production was not the nourishment of the population and the perpetuation of its ritual systems but instead the reinforcement of state power plain and simple: 'For him, agriculture was the means to enrich the state, and warfare the way to expand and strengthen the state.' The link between the two was so close that he simply referred to farming and warfare together as 'the One.'[261]

And state power itself was so important because, contra scholars who argued that virtuous leaders were needed to create a harmonious social order, Shang Yang (following Laozi) argued that moral virtues were themselves 'the result of human responses to their natural and social environment,' with the implication that an intentionally and effectively engineered political system would be capable of generating virtue within the population with or without sage guidance.[262] The *Fajia* are therefore called 'Legalists' in the English-language literature because they were the first to fully develop a theory of civic governance according to impersonal laws. More importantly, this approach then pitted the universal institutions of a state representing the entire populace

260 Jiang 2021, p. 247.
261 Jiang 2021, p. 247.
262 Jiang 2021, p. 265.

against the particular practices of custom, which differentially govern specific populations according to informal practices that depend on their context. In other words, a metaethical critique that recognised the material foundations of morality seemed naturally to lead to socially-engineered solutions in which a state technocracy was the only force capable of sculpting morality at the collective scale.

In confronting these early *Fajia* theories, Xunzi's re-conception of ritual accepted the basic premise that the ethical order had a material basis but also pointed out that the state could not be so easily severed from informal hierarchies such as those of family and social class. Rather than being cultivated within the explicit realm of a standards-based, engineered state, he argued that virtue was accumulated via a broader social practice, replacing the statist unity of agriculture and the military ('the One') with a more dynamic relationship between the economic 'nourishment' of the population and the social logic of the elite-led system as a whole. Treating the state as a universal institution that governed all through the transparent and impartial rule of law, as Shang Yang did, simply disguised the reality that government emanated from the power of the elite and was but one 'natural' hierarchy nested within many.[263] Rather than an engineered technocracy, then, Xunzi proposed an elite-led form of governance spanning both formal and informal practices, which could nonetheless measure the 'sageness' of particular administrators in the degree of nourishment enjoyed by the population under their purview (i.e., in the developmental outcomes of their policies). By contrast, the failure of this governance could be measured in the frequency of rebellions, disasters, and other emergent forms of social-ecological chaos, even if these failures could not always be traced back to specific government policies.[264]

Accounts that evaluate the present imperial order in largely geopolitical terms also tend to treat the state in a basically *Fajia* fashion, as a universal institution that governs social life through strategic policies that are ultimately designed to bolster the power of individual states against others and cultivate the proper moral sentiments in the populace. Economic crises, wars, and the

263 The Xunist project remained entirely within the elitist Confucian paradigm, which linked the personal to the familial to the political to the cosmological via the chain of 'cultivation-regulation-governance-pacification' (修齐治平). Within this paradigm, cultivating one's individual virtue, regulating the proper family order, governing the polity, and bringing peace to all under heaven are each interlinked and mutually reinforcing forms of moral hierarchy.

264 In portraying sage rulers as the 'partners of heaven,' Xunzi was essentially reinventing the Confucian claim on the older concept of the 'mandate of heaven,' which had been in use since at least transition between the Shang and Zhou dynasties (Jiang pp. 59–65).

collapse of entire polities therefore follow directly from the application of inadequate or unsuitable policies within the formal state machinery, rather than being rooted in more pervasive social practices or extra-governmental forms of domination. Rather than 'the One' of agriculture and military unified within the body of the state, we now have 'the One' of industry and geopolitics, or simply 'capital' and 'state,' unified within a distinct 'political economy.' But the basic relationship is the same.

And this means that such accounts also share much the same failure as that of their *Fajia* predecessors: the false universality of the 'civic' sphere disguises the class hierarchy from which the power of both government institutions and civil society emanate, just as the false unity of the *Fajia* bureaucracy disguised the nested hierarchy that ran from the customary rule of family and village to the formal sphere of the imperial state. In these accounts, the mute compulsion of economic power disappears under the sound and fury of state violence. An inverted repetition of Xunzi's synthesis is therefore necessary: a vast and material evil is accumulated through the day-to-day rituals of domination that express the underlying social logic of capitalism at the planetary scale and this evil manifests through the nourishing force of development itself. Though the 'universal' state appears to be the force governing this nourishment, it is itself only a surface layer, sewn atop the blood and muscle of the social substance that pulses beneath the skin – much as the chimeric body of the beast Geryon, in Dante's account, bears the visage of an 'honest man.' In other words, the great god development is merely a human face severed and stretched over the world-spanning horror of capital.

CHAPTER 9

Absolute Democracy with the King as Head of State

It is 2010 and I am watching a fire kindle on a farm in Thailand. The smoke is dark and acrid, billowing out from bits of trash to curl up in a narrow helix toward the blanched blue sky, utterly empty of clouds but heavy and pallid with the ambient pollution of nearby industrial sites. We are working on a small plot of land located on a narrow agrarian strip near the Eastern seaboard of the Bay of Bangkok, not far from Thailand's busiest deepwater port at Laem Chabang. Industrial clusters specialising in export production are scattered through the exploded suburban sprawl, less a city than a constellation of small towns and business parks intercut by stretches of sunlit fields and dark tree cover where venomous snakes spiral through root and branch. Beyond the farm, a clutch of egg-coloured condominium complexes rises out of the jungle. Up the road is a sliver of protected national forest, the edges of its dark green depths embroidered with the pale grass of golf courses and cemeteries. Toward the coast there are beaches and ports and factories. And, just north of the forest, a massive quarry draws up pulverised stone to feed into new export centres and residential developments. Between each, wild dogs hunt wearily for stray chickens and doze in the sun.

Altogether, the region is one of the country's most rapidly urbanising areas. But agricultural plots remain woven into its margins. Next door, a local squatter family had invested enough into their orchard on a once-abandoned plot of land that the crown had granted them the deed – in Thailand, every land certificate still includes the signature seal of the monarchy, which is both the original owner of all land by custom and an enormous *de facto* landholder within the modern real estate market. Overall, the pattern of urbanisation in what would soon be formalised as the Eastern Economic Corridor mirrors that seen in places like the Pearl River Delta, where housing and farmland are tightly woven into the basic bio-industrial mesh of cadastres: planetary factory, planetary ecology, planetary property. As in any part of the global hinterland, the seemingly rustic space is pockmarked with industrial artifacts. One of the farmworkers is tearing apart an old flip-flop as if it were a loaf of bread, feeding each fresh-torn hunk of polyurethane into the cauldron of black smoke frothing out of the basin set beneath the pot of not-quite-boiling water. Above, steam condenses into warm dew dripping from the feathers of the chicken, its neck broken moments earlier. The poison smell of burning plastic cuts into the rank stink of mud washed in typhoon rains now warming in the sun.

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Though I was raised on a farm and, at this point, had worked on them my entire life, the practice of wet-cropping rice was entirely alien to my experience of temperate soils and compost calendars. Here the land is not quite land. It is less substantial, more animate – a braided river of clays and silts and rotting acids swelling with the seasons. Agriculture is therefore an amphibious affair. You must wade into the slow pulsing current of earth, plunge the seeds into the amniotic mud, pluck snails from the irrigation pipes like scabs from skin, wallow with the water buffalo to stay alive in the unrelenting heat. You emerge in a cocoon of grime the colour of spilled oil swirled with rust. It dries under the sun and smokes off you in an incense of red dust, an old Buddhist adage for worldly attachment. But the feeling of work in the dirt is everywhere the same. Bloodheat pushing up against sunheat like two bulls locking horns through the skin. The stubborn material of the world embracing your body in its grappling, breathless violence. You fall again into the familiar, futile war of fist and stone. Eventually the nerves across the skin bloom with what can only be described as an ancestral terror, deep memories of thirst, famine, the quivering awareness that you are saved from annihilation only by the mercy of something merciless. After a while the body itself seems to crumble like the mud. The animal flows into the mineral. The furrow a grave that gives birth.

Other facets of hinterland life are also familiar. After all, burning trash and plucking chickens form a sort of universal cultural substrate of hillbilly subsistence, as native to my own upbringing in the blasted timberlands of the Pacific Northwest as to that of the Laotian migrant workers raised in the dense jungles of upland Southeast Asia and hired onto the farm during harvests. Our current ritual is therefore routine. The water boils briefly, then cools. It should bring a briefly submerged finger to redness, but not burn. Then the bird is dunked for scalding. Rather than held by the feet and plunged, a clean scald requires that it be fully covered and continuously agitated. I hold the pot as one of the workers uses a fallen palm frond to stir. After maybe a minute we pull it out, water sizzling into the black smoke beneath as the wet feathers glisten with steam. A clean plucking should leave your fingers ruddy with heat, and the grip should be violent but not ravenous, motions fast and firm. Then the bird can be dressed: a circular cut around the vent and fatty glands without piercing the intestines, lop off the head, slit down the backbone, rip out the crop and windpipe, and finally cut an opening into the stomach cavity just large enough for your hand. As the mist trickles from the gut like the spirit rising from the voided flesh, the top of your fingers should press against the breastbone, feeling in the body as if for something lost. Scrape out the organs tenderly. Then remove the feet by passing the blade smoothly through the joint of the leg in the fashion of the

Daoist butcher. Like any of the agricultural arts, the practice is intimate – the skin a bridge across which the soul passes now and then to touch the further shore.

When I look up, the children have returned with foraged herbs. These are arts that must be felt and smelled to be fully learned. Whenever I dream of any farm that I have lived on, I wake to the fading fragrance of blood and basil and, beneath, that familiar rot. Their father has the charcoal lit. I hand the bird off to their mother, ready with cutting board and marinade. The rice is already steaming. I move into the flow of the other tasks in the open-air kitchen, as familiar as any hippie cookout or redneck barbecue. On the road in the distance a lifted pickup truck drives by, as if to evoke the obnoxiousness of home – it even has a decal of the Thai flag and 'Long Live the King' emblazoned across the back in massive Thai and English lettering. Eventually, we settle into the sun-bleached plastic chairs around the shared table drinking beers, feet still muddy, skin kissed by the evening-softened light. The fat and the fish sauce drip down to anoint the coals. Our bodies are weary. We laugh. The sun drops behind the jungle and time rolls over us like a heavy stone.

1 Field and Frontier

Born to one of the epicentres of the back-to-the-land movement in the US, permaculture projects of this sort were perfectly familiar, as were the myriad miseries of rural life. That organic farm wedged between the export zones of Thailand's Eastern Seaboard was therefore one of many strung like fevered dreams throughout the tremulous isolation of my early life: Coastal hippie compounds mouldering in the fog under the menacing gaze of gargantuan redwoods once culled by industry and now returned to drink the ruin of that industry as dryads drink the mist. High mountain communes starved by time and the ever-encroaching drought, their edges eaten by the rivers that writhe forever like snakes in the throes of death. Or strawbale houses mashed together by foot and hand on tick-jewelled fields in the humid ecstasy of Midwestern summer, mud drying through the solstice, floors hardened by the heavy footfalls of the harvest. But soon enough the dying comes, and each earthen home is stranded on the icy plain of dark boreal winter, its frail mudheap hearth flickering against the outer cold like an errant organ scattered steaming in the indented snow after the hawk swings low to carry the hare to its burial in the bone-coloured sky. Like the wretched winter strawbale, these latter-day utopias bore an imprint of their forebears but lacked the vigour and violence of the original. Squat and unelectrified, they rot in forsaken fields, utopias unmoored.

In the American case, this utopian reenactment of settlement took place in spaces of ruin and abandonment, largely detached from immediate questions of class conflict. In Thailand, however, less time separates enclosure from development, allowing otherwise-identical agrarian schemes to retain a certain proximity to mass politics. In fact, divergent images of rural life have served as a sort of nexus for the violent political struggles that followed from the impact of the Asian Financial Crisis on the country – which saw two coups in as many decades – pitting the right-wing pastoralism of monarchists and urban professionals against a developmentalist populism bankrolled by powerful industrialists and buoyed by discontent among the poor. The small farm where I worked was no exception. Like many similar plots in the area, some owned by expats, most by middle-class Thais, it served as less of a farm and more of a cultural performance. These were not the semi-subsistence, semi-sharecropping fields common to the impoverished northern countryside, but instead the glorified gardens of exurban hobbyists.

As if to underline the fact, much of the day-to-day work in agriculture, construction, and processing was done by poorer migrants from the rural north, many of whom had left behind their pittance of mud in their own village to till richer land for others in exchange for cash. This was the case with the family that I worked alongside, whose darker skin and Laotian-inflected accents signified their lower social status. By contrast, when massive flooding hit the area later that same month, I went with a team of volunteers to help emergency harvest a cassava field that had been partially destroyed. The owners were middle class Thais who ran a small business and drove an enormous diesel truck. Someone asked if the family would make much money from selling the small mountain of cassava that we'd pulled from the mud, but the mother of the family shook her head, explaining that they hardly made a profit at all. The land itself was just barely paid off. When someone else asked why they planted the land at all, she smiled and explained that her 'great king Bhumibol' had asked the Thai people to farm and become self-sufficient, and that this would help make the country strong. The government was very corrupt, she argued, and this created a dependence on foreign powers. But, led by the king, 'good Thai people' could return to their cultural roots and rejuvenate the nation. Across the street, dogs with distended bellies dug through the flood-turned soil.

Afterwards, when we were loading up the cassava to take to the processing centre, I noticed an old pin emblazoned with a picture of the King stuck to the back seat, embroidered with the iconography of the monarchist, military-backed yellow shirt movement. Only months prior, the opposition red shirts – the more modernist of the two populist movements, with a strong base among

ruralites in the North and the more precarious strata of the urban proletariat – had led the largest popular uprising in the country's history, with protestors flooding in to occupy Bangkok's central business district in rebellion against an unelected government placed in power through a constitutional coup conducted a few years earlier. With the support of prominent yellow shirts, many of whom had since won government office, the military then initiated a bloody crackdown on the occupation. The army fired live rounds at protestors armed with rocks and sticks. Snipers surrounded the occupied area, assassinating a well-known red shirt leader and forcing reporters to retreat from the combat zone. More than 80 people were killed and thousands injured. Meanwhile, middle class yellow shirts cheered on the deaths of these protestors, many of whom, I knew, would have spoken in the same Lao-accented Thai as the lower-class family I was living with. Perhaps most ironic was the fact that both populist factions framed their movement as an attempt to defend and rejuvenate the Thai nation and its rural heartland. How, then, did this hobby-farming family from a well-off but still relatively modest background gravitate toward the tacitly murderous politics of the far-right?

Thai populism had been born neither red nor yellow. In fact, prior to the early 2000s, there was not even a generally accepted or widely used term for 'populism' in the Thai language.[1] During the Cold War, essentially all mass political activity had been suppressed under a military autocracy backed by the US and ruling in the name of anti-communism. While military rule had allowed Listian developmental states to take shape in Japan, South Korea, and Taiwan, however, postwar Thailand was instead cultivated into something closer to the military liberalism espoused by Truman. The country's first five-year development plan (implemented in 1961) was literally just a modified version of a World Bank report. In this plan, the stronger forms of state intervention that had been pursued by the two major pre-war nationalist factions were rolled back in favour of a bureaucratic infrastructure modelled on US postwar standards, including 'a planning board, budget bureau, investment promotion machinery, and restructured central bank' as well as 'new regulations governing urban labour, and … a labour bureaucracy to administer them,' all of which were run with the help of US advisors.[2] In exchange, US firms were given special privileges, such as being allowed full ownership of projects that they had invested in rather than being required to channel capital through joint ventures. Though many key sectors would remain monopolised by the state, and tariffs would

1 Phongpaichit and Baker 2009, p. 8.
2 Baker and Phongpaichit 2009, p. 151.

continue to play a key role in macroeconomic management, these early plans nonetheless established a relatively open stance toward the global capital market. Over the subsequent decades, the system would come to be referred to as a 'bureaucratic polity.'

Meanwhile, political and economic power in the country was entirely reliant on the foundation of military-industrial support afforded it by the US. Thailand served as both a figurative and literal military outpost for US interests in Asia from the very beginning of the Cold War. As it became a site for the staging of US troops, the country saw the presence of Americans and their affiliated companies increase, visible in a growing population of American soldiers and US-funded infrastructure projects designed to facilitate ongoing anticommunist campaigns across Indochina. Similarly, as the military-bureaucratic core of the Thai state was made into an appendage of the US geopolitical order, Thailand grew into an important proxy power in the region with a certain degree of autonomy. Throughout, the patronage relationship between American military interests and Thai bureaucrats was often brazenly obvious, as when the US issued the postwar dictatorship 15 million dollars to recognise the Bảo Đại puppet regime in Vietnam. Shortly thereafter, in exchange for Thailand sending troops and supplies to support the American War in Korea, 'the USA provided another US$10 million in economic aid, the World Bank gave a US$25 million loan, and the arms supplies started arriving.'[3] Altogether, the scale of these subsidies was substantial: 'The total amount of regular US military assistance to the Thai armed forces during 1951–1971 amounted to 59 per cent of the total Thai military budget; and total US assistance during 1965–75 was equivalent to all of Thailand's foreign reserves.'[4] These funds and supplies were then put to use bolstering military rule at home and, later, fighting the communist insurgency in the countryside and even massacring student protestors.

If the military autocracy was the baton poised above any mass political movement, then development was the bribe, serving to pay off portions of the populace that might prove unruly – especially important in the absence of any sort of land reform campaign. And, although these initial developmental policies failed to instigate an industrial boom of the size or scale then occurring in Japan and soon seen in places like Taiwan and South Korea, they nonetheless brought substantial growth and wide-ranging economic transformation. Between 1961 and 1978, GDP growth averaged 7.8 percent per year.[5] And, while

3 Baker and Phongpaichit 2009, p. 144.

4 Glassman 2004, p. 37.

5 As measured by World Bank indicator NY.GDP.MKTP.KD.ZG.

the explosion in commerce and the construction of major new infrastructural projects would define the popular image of the boom, the real engine of growth was agrarian. Political and economic power in the region had long been concentrated in the lowland 'paddy states,' which expanded their power by extending the frontier of rice cultivation further along coastlines and major river deltas. In contrast, upland areas had been effectively stateless zones populated by a number of distinct ethnolinguistic groups (commonly grouped together as 'hill tribes') who subsisted through a mixture of swidden agriculture, hunting, foraging, semi-illicit trade, and raids on lowland states, who often raided back in kind, using captured uplanders for corvee labour.[6] By the 1970s, the upland areas had also become hotbeds of communist organising, with the Thai military conducting regular extermination campaigns throughout the country's north as the US bombed communist strongholds across the borders in similarly mountainous parts of Vietnam and Laos.

But these military campaigns were also accompanied by deeper socioecological changes induced by the extension of the market. As population growth placed pressure on the thoroughly-settled Chao Phraya delta stretching north of Bangkok – which had long served as the country's central rice-bowl – and on subsidiary centres around cities such as Chiang Mai, the agrarian frontier gradually advanced into the higher altitudes. The process was made possible by highways, dams, irrigation, and public health (namely malaria-eradication) projects sponsored by the US and subsidised by the government, which also removed existing restrictions on logging. But, at root, this frontier advanced on waves of agricultural settlement. Following a pattern that should now be familiar, local ecosystems were reconstructed to be suitable for the production of cash crops. As elsewhere, homesteading was central, with settlement proceeding in roughly three waves:

> First came the loggers along with early settlers who practiced shifting cultivation and then moved on, following the logging parties. Next came lowland farmers, sometimes commuting between their lowland paddy-farm, and an upland plot, which could be worked in a different season. The third wave brought the landless poor, squeezed out of the valleys by population pressure. Often they were trucked in by a new breed of agrarian entrepreneurs who hired them tractors to plough the land, lent them money to plant the crop, and took away the produce. These entrepreneurs worked

6 For an overview of the evolving territorial character of the Thai state, see: Winichakul 1994; and for an overview of upland Southeast Asia's stateless societies, see: Scott 2009.

> in turn for export agents, sugar mills, tobacco-curing yards, oil pressers, rubber packers, feedmills, and canneries which sprang up in boom towns throughout the upland zone.[7]

Thus, the population was forced into further dependence on the market. The same was true of the new monocultures, which were increasingly reliant on inputs of fuel and fertiliser, themselves inextricably linked to the new oil economy that lay at the foundation of US hegemony. The process was then accelerated by the government's response to both general rural unrest caused by development and a more focused communist insurgency. The army cleared jungle, built military roads, razed rebel bases, and encouraged pioneer settlements in their place. In another familiar echo of earlier frontiers, then, this military vanguard helped to anchor settler agriculture against the threat of an insurgency that was effectively synonymous with the wilderness.[8]

Though initially benefitting from the stored-up fertility of uncultivated soil, which allowed earlier settlers to profit from a wide variety of high-return cash crops in addition to rice agriculture (newly planted areas were split roughly 50–50 between the two), the combination of unreliable rainfall, severe erosion, and the loss of moisture and nutrients in the soil – all either caused or aggravated by the retreat of forest cover – ultimately channelled farmers toward a small subset of hardier species, with corn and cassava alone coming to occupy half the total area newly developed for cash crop production in these upland zones. The scale of the transformation was enormous: 'In 40 years, Thailand's cultivated area tripled' such that roughly 800,000 acres of agricultural land (distributed between roughly 70,000 frontier farms) was appearing each year at the height of the expansion, from the 1950s through the 1970s.[9] Over the same time period, forest cover fell from two-thirds of the country's land area to one-third, replaced by monocultures of rice, corn, and cassava. Though the new population of settlers would often be referred to as peasants and many subsidised their own survival through some level of subsistence farming, very few were self-reliant. After all, the average farm size was a mere 10 acres. Market dependence

7 Phongpaichit and Baker 2009, pp. 156–7.

8 Geographically, settlement was easiest not in the highlands but instead in the vast upland plains, the largest of which was the Northeastern Khorat Plateau in Isan, covering almost a third of the country's land area. This wave of settlement would also see new arrivals from the south intermixing with the region's older subsistence population, many of whom had closer cultural and linguistic ties to Laos and/or upland ethnic groups than to the settlers from the central plains. Later waves also extended southward in less established coastal basins down the peninsula.

9 Phongpaichit and Baker 2009, p. 157.

was therefore the norm, even among landholders: 'For cash-crop cultivation they needed to buy seeds, fertilisers, and pesticides, and perhaps hire equipment for land preparation and harvesting.' Meanwhile, market demand also determined what they produced in the first place and how much they received in exchange for their harvest at the end of the season. Often, this dependence was even more extreme, with many farmers essentially turned into workers: 'Many producing vegetables, sugar, or poultry were tied into contract farming schemes where they supplied little more than the labour.'[10]

The rollout of new rice varieties and other green revolution technologies also triggered a rapid increase in agricultural productivity throughout this period, requiring less labour on the farm and contributing to a demographic boom in the cities. Even though absolute poverty declined, the rural-urban wage gap grew wider. By the 1980s, the returns on new settlement began to rapidly diminish as both local and global conditions posed new difficulties: 'the land frontier ran out, investment was diverted to industry, and the world terms of trade turned against agricultural goods.'[11] Meanwhile, with the Vietnam War over and the Cold War in Asia winding down due to the rapprochement between China and the US, military funding also began to dry up.

While Thailand's proximity to the booming Pacific Rim industrial complex and its lower reliance on developmental loans (in part due to its higher access to direct military subsidies from the US) ensured that it would escape the fate of other poor countries in what came to be known as the Third World Debt Crisis – plaguing most of the world throughout the 1980s – the country nonetheless saw a decade of slower growth and gradual reorientation away from agricultural expansion and toward export-oriented industry concentrated in and around Bangkok. Even before the terms of trade for food commodities began to narrow, diminishing agricultural returns and rising productivity saw many rural families sending their youth into the cities, sometimes for seasonal work, sometimes for short-term education or money-making, and sometimes as permanent migrants, usually remitting wages to the countryside. Though the phenomenon would later be associated with the export boom in the 1990s, it was well-established before then, with 1.5 million people moving between city and countryside seasonally by the late 1970s. Initially, proximity to Bangkok and growing land use pressure driven by urbanisation on the Chao Phraya Delta meant that most migrants were relatively local. But soon workers were pouring into the city from as far as Isan.[12] By the turn of the century, large inflows of Lao-

10 Phongpaichit and Baker 2009, p. 158.
11 Baker and Phongpaichit 2009, p. 19.
12 Phongpaichit and Baker 2009, pp. 162–3.

tian and Burmese migrants would join them. Over the same years, increasing numbers of rural Thais also migrated overseas for work in other booming economies across Asia, with tens of thousands pouring into Taiwan, Japan, South Korea, Israel and the UAE, as well as neighbouring Malaysia and nearby Singapore.[13]

2 Chao Praya Utopia

Following a pattern already seen in places like Japan, Taiwan, and early industrial Europe, the countryside provided a flexible pool of labour partially subsidised by subsistence agriculture. In Thailand, this then ascribed a strange ideological status to a 'peasantry' that had in many places only recently been implanted into the land, had never functioned within self-reliant villages, and had even brought with them new gendered divisions of labour which – contra earlier cultural standards in the region – saw men take the leading roles in agricultural work, trade and (via the rising influence of Buddhism relative to local spirit worship) even in religious practice. All of these changes created a new mythos of peasant life that was, ironically, engendered only through the process of proletarianisation.

As ruralites moved into the cities, the image of a simultaneously tragic and idyllic countryside was soon enshrined in popular culture via new genres of media such as *luk thung* music. Literally translated as 'child of the field,' *luk thung* is a syncretic genre incorporating Latin American tempos and Western rock and country band formats, but tuned to Thai scales, accompanied by traditional instruments, and firmly rooted in the folk styles of the central plain. Most major singers come from rural backgrounds.[14] Rather than pastoral scenes, however, the songs largely focus on 'the excitement and the heartache of leaving the city for the village' describing migrants' 'new urban lives as truck drivers, waitresses, bus conductors, factory hands, and sex workers.'[15] As in all good country music, the rural expresses both longing for a lost past and recounts the contours of a tragic pastoral landscape only barely escaped. On the one hand, singers 'returned to the theme of remembering the peace of the village, the warmth of the family, and the boyfriend or girlfriend left behind.' On the

13 Harkins, Benjamin (Ed.) 2019 'Thailand Migration Report 2019', *United Nations Thematic Working Group on Migration in Thailand*, p. 20. https://thailand.un.org/sites/default/files/2020-06/Thailand-Migration-Report-2019.pdf

14 For the leading ethnomusicological overview of the genre in English, see: Mitchell 2015.

15 Phongpaichit and Baker 2009, pp. 163–4.

other, 'they lamented the crop failures, natural disasters, and general poverty that had forced them to migrate.'[16] Following the classic pattern of romantic and pastoral literature, the countryside is only encoded into popular culture through its material destruction and the pathos of its loss.

This sense of loss can then be expanded to encompass a more general striving after some organic form of human community threatened or destroyed by industrialisation. Romantic appraisals of the rural have therefore always served as one of the two faces of development itself. We might even say that the mirage of communal self-sufficiency plays a role in the rural areas similar to that of civil society in the cities. And it is for this reason that a certain 'agrarian myth' centred on the figure of the peasant has long served as the foundation for populist political movements in general and for right-wing nationalism in particular. Marxist anthropologist Tom Brass, who conducted decades of work studying rural politics in Peru and India, offers a broad definition of this agrarian myth, which he describes as:

> a discourse about the desirability/feasibility and 'naturalness' of small-scale economic activity (peasant family farming, artisanry) in the countryside. It is also supportive, therefore, of rural cultural forms/institutions based on this economic activity: namely, the family, village, regional, ethnic and religious identities which are perceived as being derived from Nature.

These positive aspects of an idealised rural life are contrasted with a negative portrayal of all things urban, industrial, and institutional, depicted as

> non-indigenous, inauthentic and 'alien' (= non-natural) internationalisms imposed on an unwilling and mainly rural population by 'foreigners' and/or their representatives within the context affected, and thus as responsible for the erosion of hitherto authentic local traditions and values.[17]

In the Americas, this myth often exists in tension with (or as an internal tension within) the emancipatory potential of indigenous struggles, which are able to mobilise direct and ongoing communal practices like 'the Andean indigenous and peasant *ayllu* (i.e. a form of communal association in the Andean

16 Ibid.

17 Brass 2000, pp. 9–10.

region, especially found among the Quechuas and Aymaras)' to serve as 'a potential model and starting point for the universalised political community of the future.'[18] Elsewhere, however, appeals to tradition rarely carry any such potential and, more often, serve the opposite purpose.

In a way, we might even think of the agrarian myth as something like a shadow cast behind the process of enclosure itself. Trailing just behind the grinding wheels of displacement and development, the myth covers the tracks of the very dispossession that produced it. Viewed from the distance of the booming cities, the countryside now appears not as plantation and threshing ground but as an idyllic space of gurgling streams and ancient tradition. Thus, rather than declining in importance alongside urbanisation, 'the economic breakdown of traditional agrarian structures (= deapeasantization) in the Third World by post-war capitalist development has been accompanied by a discursive re-essentialization of the peasantry.'[19] In this way, the resurrected agrarian myth has come to serve as the foundation for a peculiar series of postmodern populisms that not only find their social base among urban professionals but are also often pitted in violent struggles against ruralites themselves. In Thailand, the agrarian myth would soon become a central element of the rightwing populist movement organised under the yellow banner of the monarchy. Against the modernists' programs of rural development, the royalists would invoke themes of 'sufficiency' (*phophiang*), rural contentedness, and 'village community' (*baan*), all of which revolved around both a particular national myth of 'Thainess' (*khwampenthai*) upheld by the equally mythic figure of the 'farmer peasant' (*chao naa*).[20] This myth would then be enshrined within the halls of power via the monarchist-military alliance that eventually won control of the state.

The earliest form of the myth arose in the 'community culture movement,' which emerged from the country's fledgling NGO circles in the 1980s. In contrast to the failures of state-led development programs that sought to impose practices on ruralites from above,

18 This quote (from Arboleda 2016, p. 217) is a description of an argument laid out by Bolivian vice president Álvaro García Linera in his earlier work, which was subsequently abandoned in favour of a more traditionally developmentalist position. The trajectory of García Linera's own position with regard this question is itself a good illustration of the more general tension that exists between emancipatory indigenous politics and the invocation of indigenous tradition in the form of an agrarian myth that is ultimately an expression of the industrialisation project itself.

19 Brass 2000, p. 1.

20 Dayley 2011, pp. 343–4.

> the activists argued that development should be rooted in villagers' own knowledge, and should try to strengthen local culture and preserve village style social relationships since these were inherently more humane and more in line with Buddhist values than those of urban capitalist society.[21]

The basic approach was also taken up by a number of former leftists who had slowly turned to communitarianism as the Cold War wound down. For example, Chatthip Natsupah, once a Marxist intellectual, 'saw the Thai village – or rather an essentialised, even orientalised, version of it – as the site of resistance to capitalism – or rather to the global, Western, consumerist and materialist civilization which did not have much of a domestic presence in the villages.'[22] Similar views were espoused by far-right Buddhist fundamentalists such as the group Santi Asoke, which runs a series of autonomous rural communes throughout the country where they practice chastity and organic farming. Politically, the group is deeply influenced by former military commander Chamlong Srimuang, who once led anti-communist brigades in Laos and Vietnam and may or may not have been involved in the notorious Thammasat University massacre in 1976.[23]

Though these new forms of rural utopianism may have begun as somewhat marginal positions produced by the strange fermentation of right-wing politics that took shape toward the end of the Cold War, they would soon enter the mainstream in a spectacular fashion. Shortly after the Asian Financial Crisis, when public sentiment was steeped in anti-capitalist, anti-imperialist, and anti-Western scorn, the king himself invoked the notion of a 'sufficiency economy' in his annual birthday speech. Posed in contrast to the 'Asian Tiger' model pursued in the 1990s – which had ultimately ended in the speculative bubble that created the crisis – the sufficiency economy was defined as 'a philosophy that stresses *the middle path* as an overriding principle … "Sufficiency" means moderation, reasonableness and the need for self-immunity mechanisms for sufficient protection from impact arising from internal and external changes.'[24] Though this philosophy was intentionally vague, the monarchy was more explicit when it came to concrete questions of agrarian development. For example, the king was also credited with having developed 'The New Theory' (*thridsadi mai*), which 'asserts that Thailand's small cultivators should seek

21 Baker and Phongpaichit 2009, p. 216.

22 Winichakul 2008, p. 579.

23 Dayley 2011, pp. 350–1.

24 Priyanut Piboolsravut 2004 'Research Note: Sufficiency Economy', *ASEAN Economic Bulletin*, 21(1). p. 128, emphasis in original.

complete self-reliance on 15 rai (6 acres) of land' divided into areas for ponds, rice cultivation, mixed crops, and animal husbandry. The theory also required that 'farmers must carry no agricultural debt, use no chemical herbicides or pesticides' and prioritise subsistence rather than sales for the market.[25] In retrospect, then, the crisis was the moment at which this right-wing, romantic, and royalist populism first began to clearly diverge from its liberal developmentalist counterpart.

3 Country Encircles City

Despite this subsequent split, both populist factions ultimately traced their roots to the same series of struggles that emerged in the Thai countryside over the course of the 1980s and 1990s, when the economic returns of the military-agrarian settlement project had begun to diminish. Meanwhile, as the boom in export-oriented manufacturing took off in the 1990s, investment was funnelled into the cities and away from the countryside and farmers who continued to suffer from falling agricultural prices were now also burdened with rising debt and diminished access to credit. Rural families thereby become increasingly reliant on remitted wages from children sent to work in the city, incentivising the outflow of rural labour to the new factory districts. Meanwhile, environmental conditions also worsened as the ecological costs of slash-and-burn settlement finally began to be felt in aggravated flooding, landslides, droughts, and increasingly costly reliance on continual inputs of chemical fertilisers. Though geographically distant, urban development also exerted a direct environmental impact on the countryside in the form of the enormous hydropower projects and associated extensions of the electrical grid needed to fuel industry. The government's response then undercut crucial survival industries that emerged as stopgaps by criminalising those who subsisted on illegal logging and hunting.

Over the course of the 1990s, these issues served as a trigger for escalating protests among both market-oriented farmers and effectively proletarianised ruralites who had only marginal landholdings. By the middle of the decade, government statistics recorded almost 1,000 protests, compared to a mere 42 in 1978. Of these, most 'were rural, and around half about the control over natural resources.'[26] Overall, the emergence of this new rural politics was only possible because the Thai military's capacity to suppress organising in the countryside

25 Dayley 2011, p. 348.
26 Phongpaichit and Baker 2009, p. 19.

had declined substantially with the conclusion of the Vietnam War, the US rapprochement with China, and finally the collapse of the USSR itself: 'In a frank interview, a senior army officer explained that whereas the army simply used to shoot rural dissident leaders, they now only sent people round to intimidate their wives.'[27] But the end of the Cold War had also changed the organisational dynamics of rural unrest itself. Since the Communist Party of Thailand had effectively dissolved through mass defections in the early 1980s, the protests were led by new rural organisations such as the Northern Farmers' Network and the Assembly of the Poor, all of which had a particularly strong following in the Northeast.

At the same time, a new generation of activists had also emerged among students, professionals, and others in the urban middle strata. These activists adopted the language and organising strategies of 'new social movements' elsewhere, visible in a proliferation of NGOs and reform-oriented political parties. The end of the Cold War was again a crucial factor here, with the military finally forced to allow such organisations to exist and the defeat of the Soviet Union shifting the global political landscape away from questions of class struggle and toward a liberal activist model emphasising issue-based advocacy and non-violent organising within civil society. The rural and urban wings of the new populist current initially operated in sync: 'The rural protests tapped the services of NGO workers, journalists, and intellectuals to organise their campaigns, articulate their demands, and add a touch of legitimacy to their projects.' But rural struggles remained at the core of the movement: 'The urban activists allied with the rural campaigners out of conviction but also out of a need for numbers to create political weight.'[28] Meanwhile, the involvement of new international human rights and environmental NGOs – offering funding, training, and media support – ensured that the movement was integrated into both regional and global civil society networks. The struggles of organisations like the Association of the Poor were thereby elevated to serve as models within the broader anti-globalisation milieu.

The space for civil society also grew as direct military rule was gradually phased out over the course of the 1980s, followed by a series of elections, coups, and cabinet dissolutions, with the monarchy often stepping in as mediator. While this process also saw the reemergence of mass politics, visible in larger public protests and the flourishing of new media outlets, there was initially no need for elites to draw on these struggles for popular support. Nor did any pose

27 Ibid.

28 Phongpaichit and Baker 2009, p. 21.

an outright military threat, as both student protests and communist insurgency had in the 1970s. Instead of popular appeal, the emerging parliamentary system was defined by an alliance between the old military-bureaucratic interests and a new political class who guaranteed votes through direct kickbacks to particular sectoral and geographic constituencies. The result was a volatile and fragmented power structure dominated by a proliferation of internal bureaucratic factions and small political parties united only by this generalised practice of 'money politics,' spurring an endless series of corruption scandals.

Though certainly parasitic, this corruption was ultimately buoyed by a very real boom in labour productivity within the growing export sector. By the beginning of the 1990s, Thailand ranked as the world's fastest-growing economy. Red rivers of value soaked into the Chao Phraya delta as cheap Thai labour was drawn into the emerging planetary production chains for semiconductors and automotives. Firms from Japan led the wave of new foreign-direct investment, followed by those from Hong Kong, Singapore, the US, and Taiwan, all often operating in partnership with Thai conglomerates. Meanwhile, other Thai firms emerged as component producers or providers of key infrastructural services, mimicking the pattern seen in the earlier 'Asian Tiger' economies. The handful of older Thai industrialists who had cultivated ties with the military were thereby joined by a new generation of Thai business interests, all siphoning their own fill of the value flowing through new export zones.

But, while business retained lucrative ties to the military and the bureaucracy and often paid off local politicians, it had little need or appetite for more expansive political interventions. Growth seemed all but guaranteed. On average, political parties were small and high-level posts were essentially kleptocratic and largely self-serving, with record profits ensuring that even large rents failed to hinder overall growth. Limits on the private sector remained, however, as was evident when the business-friendly administration of Chartchai Choonhavan (elected in 1988) was cut short in 1991 by his attempt to privatise the military's lucrative state-owned enterprises.[29] The 'bureaucratic polity' was still very much in place. Social struggles therefore had to be launched from outside the electoral system they were petitioning. Although these protests were often largescale, and many were led by extensive and disciplined organisations, they did not seek to take power or build any independent force outside of the existing political system. As in Hong Kong, this turn to civil society had been shaped by the global resurgence of liberal politics. But, in Thailand, it was also a response to the fairly recent failure of both the democratisation uprising of

29 Glassman 2004, pp. 92–7.

1973 and the Communist Party's guerilla war. The 1973 uprising had resulted in a brief period of democratisation, but was defeated shortly thereafter when right-wing paramilitaries were mobilized to massacre leftist forces occupying Thammasat University in 1976, restoring the bureaucratic polity to power and ending the three-year experiment in democracy. Though this initially caused a surge in Communist Party membership, as remaining leftists fled to the jungles to take up armed struggle, by the mid-1980s, the Party's remaining 80,000 members had all surrendered in exchange for a combination of amnesty and cash payouts.[30]

Ironically, it was not long after the Maoist attempt to surround the cities from the countryside had failed that a new and unprecedented wave of rural discontent did, in fact, begin to flood into the city. As early as 1992, farmers began to make regular marches on Bangkok to demand land reform, repayment for displacement, and various changes to forest and resource management policies.[31] By the middle of the decade, an expansive coalition of rural groups and urban NGOs had formed under the leadership of doctor, public health activist, and devout Buddhist Parwase Wasi, whose combination of liberal and royalist leanings helped to bridge the gaps beginning to form between the various populist factions.[32] Under external pressure from the protests and faced with internal threats of instability – due in part to ongoing dissatisfaction among the new business class – the government finally agreed to draft a new constitution. At the core of the drafting process was an attempt to reform political institutions such that money politics would give way to a modern party system helmed by a strengthened prime minister and backed by new standards of semi-judicial checks and balances. To satisfy the external pressure from civil society, the draft that emerged in early 1997 'contained a long list of civic rights, including community rights over natural resources' with one section of the document 'virtually a manifesto of the 1990s reform movement with provisions for decentralization, greater popular participation, liberalization of broadcast media, and election reform.'[33]

That same year, the Assembly of the Poor launched its largest protest yet, in which 7,000 villagers marched on Bangkok, where they established an encampment in front of the Government House that lasted for more than three months.

30 Al Jazeera 25 June 2017 'Ex-communists pocket cash benefits in Thai amnesty deal', *Al Jazeera*. https://www.aljazeera.com/news/2017/6/25/ex-communists-pocket-cash-benefits-in-thai-amnesty-deal

31 Phonbpaichit and Baker 2009, pp. 19–20.

32 Baker and Phongpaichit 2009, p. 255.

33 Phongpaichit and Baker 2009, p. 22.

Daily participation in the protest encampment peaked somewhere between 10,000 and 20,000, 'claiming to represent at least some 50,000 Assembly members.'[34] This represented the largest protest the country had seen since the 1973 uprising, and full democratisation seemed to be on the horizon – especially given the rising discontent of the business class itself with the bureaucratic polity. The Assembly united with many of the same members of Parwase's NGO coalition to present a list of grievances to the government, mostly related to rural conflicts over land and forest use but also including a series of health and safety demands made by one of the few worker organisations in the coalition.[35] The encampment finally ended after the government agreed to the bulk of concessions, 'including compensation of 4.7 billion baht for villagers displaced by dams, recognition that settlers could remain in 'forests', and review of several pending dam schemes.'[36]

However, the outbreak of the Asian Financial Crisis followed soon after. The initial impact of the crisis on the recently-won victory was mixed. On the one hand, the threat of mass unrest ensured that the 1997 constitutional draft, initially seen as far too radical to pass through parliament, was ultimately endorsed without issue. On the other, most of the material concessions that the government had promised were rolled back in the name of stability and survival. Similarly, an ambitious economic plan promoting greater democratisation and 'people-centred development' was scrapped, though many of its proposals for decentralisation and participatory governance were later adopted as a sort of austerity measure by desperate localities and departments short on funding. Ultimately, though, the shock of a sudden deflationary crisis succeeded in disciplining the labour force in late 1990s Thailand much as it had in the early 1920s US. The defeat of the movement was only further confirmed when the collapse of the executive government at the end of the year saw essentially all the concessions awarded to the Assembly of the Poor immediately revoked by the successor regime.[37]

Behind the scenes, the crisis was also subtly reshaping the balance of power. Both the old bureaucratic elites and a new faction of industrialists overseeing the country's biggest businesses had clearly benefited from the export boom, with elected officials serving as mostly passive and largely local rentiers. After the crisis, however, it was the political class that bore the brunt of the blame,

34 Glassman 2004, p. 103.
35 The Council of Work and Environment Related Patients' Network of Thailand (Ibid.).
36 Baker and Phongpaichit 2009, p. 218.
37 Phongpaichit and Baker 2009, pp. 22–3.

with the very same liberal policies that had drawn in global investment and stimulated rapid growth now portrayed as serving international interests at the expense of the Thai people. While obviously true, the narrative also obscured the way that Thailand's own elites had profited from the bubble and played an essential role in constructing it. Thus, the crisis not only led royalists and bureaucrats to demand greater protections from the global market but the incautious liberalisation of the country's financial system had also convinced the country's biggest business interests that more competent macroeconomic management was needed to induce development in the face of unfair competition from the wealthy countries.

Though discourses of decentralisation and sufficiency became increasingly common as both themes of ongoing rural protest and local austerity measures, it was instead the modernist faction of the populist movement that initially proved most successful. The immediate recovery was led by telecom billionaire Thaksin Shinawatra, who forged an alliance of big business interests and drew on the remains of the 1990s populist current to build out the country's first modern political party, winning a landslide election – gaining the largest majority in Thai history – on a platform promising a series of modernising reforms and quasi-Keynesian stimulus measures, many of which were concentrated in the countryside. The campaign effectively revived an older proposal by banker and minister Boonchu Rojanastien in the 1980s, who had argued for more active government intervention along the lines of other East Asian developmental states, dubbing the strategy 'Thailand, Inc.' Echoing this, Thaksin now argued that 'a country is a company.'[38]

Domestically, he sought to refine the political system and institute internal evaluation mechanisms for local governments based on their economic performance, similar to departments within a corporation. Internationally, he argued 'that in catch-up economies, government has to play a positive role in protecting and promoting firms and sectors to overcome the disadvantages of competing against more advanced economies.'[39] These programs were incredibly profitable for both Thaksin's own family conglomerate (the Shin Corporation) and for big business in general. However, the modernisation of the political system undercut the patronage structures of the political class, constrained the kickbacks enjoyed by the old bureaucracy, scorned certain major capitalists, and even threatened to challenge the moneyed interests of the monarchy.

38 Phongpaichit and Baker 2009, p. 13.
39 Phongpaichit and Baker 2009, p. 100.

Post-crisis politics would thus be defined by a battle between elite factions over control of the state. Though alliances often shifted over the subsequent decade, these factions ultimately sorted into two loose camps, each appealing to a different base of popular support. On one side were the monarchists, backed by the old military and bureaucratic interests, alongside certain capitalists left out of the new system. Over time, they would cultivate a mass base among small businesspeople and urban professionals whose distance from the realities of poverty and rural life gave the agrarian myth its enduring vitality. On the other side were the modernists, backed by the big business interests that had survived the crisis and united under the leadership of the Shinawatra dynasty – first under the administration of Thaksin, then his sister Yingluck, and today his youngest daughter Paetongtarn. Their mass base was strongest among ruralites from the north (including rural businessowners, larger landholders, and effectively dispossessed smallholders) and the more precarious members of the urban proletariat.

This divide between monarchists and modernists would be defined by a series of strange inversions. The romantics peered out of their urban apartment towers toward the mirage of a rural utopia. In contrast, ruralites themselves called for the countryside to be developed much like the cities had, promoting electrification, education, and entrepreneurialism. Both invoked anti-imperialist messaging and actively stoked an entirely new type of nationalist sentiment, with each elite faction pushing its own definition of what it meant to be Thai. On the ideological stage, the utopian spirit was thereby pitted against the great god of development over two dubious decades of royal intrigue and political violence. Behind the scenes, hostile brothers waged a familiar battle on the drying shores of the river of blood, their prospects narrowing as more powerful siblings siphoned more of the global pool of value for themselves.

4 The Aborted Miracle

Just as that small farm plot found itself wedged between dwindling jungle and booming export zones, so too was Thailand as a whole wedged between the familiar perils of underdevelopment and the whirring machinery of a planetary factory over which it had little control. Both the sufficiency economy and Thaksin's corporate state were forced to operate within a landscape that had already been reshaped by capital, intensifying the rural-urban divide and plugging Thai production networks into global supply chains that, by the turn of the century, were increasingly routed through China. Thus, both mon-

archists and modernists found themselves pressed on from above by more powerful blocs of capital and outflanked by lateral competition from Chinese industry. While this intraclass competition was fierce at every tier, however, it remained a fraternal hostility. Far more volatile was the rising force of the country's embittered proletariat from whom the pool of blood was drawn. It was this threat that forced both factions to perch their political strategies on the shoulders of a mercurial populism. The result was that inter-elite conflict intensified into a mass political conflict that brought the country to the brink of civil war.[40]

By the 2000s, Southeast Asia had come to occupy a somewhat indeterminate role in the new Pacific order. Prior to the rise of mainland China, it initially seemed as if Thailand, Malaysia, and Indonesia were poised to become the next centres of the industrial boom. From the late 1980s until the late 1990s, each country saw sustained annual per capita GDP growth of five percent or more, with large quantities of FDI pouring in from the US, Japan, and regional financial centres such as Singapore and Hong Kong. Thailand saw by far the earliest and fastest of the booms, however, with per capita GDP growth rates of 11.3 percent in 1988, 10.3 percent in 1989, and 9.3 percent in 1990.[41] Building on the slightly lower but still substantial growth that prevailed in the postwar period, the 40 years between 1960 and 2000 saw the Thai economy grow at an average of 7 percent per year, while 'per capita GDP increased from US$100 in 1961 to US$2750 in 1995.'[42] Meanwhile, industry had already overtaken agriculture in its share of total output by the early 1980s, well before the height of the export boom.[43] As a share of employment, however, the impact would remain subdued. Even as industrial employment reached its pre-crisis peak in 1996 (at 22 percent of the total), it was still outpaced by services (26 percent) and the bulk of the working population (52 percent) remained in agriculture (see Figure 23). By comparison, in neighbouring Malaysia, manufacturing employment peaked at 34 percent in 1997, far above agriculture, which accounted for a mere 17 percent of employment in the same year.[44] At the time of the crisis, Thailand

40 At the global scale, the red shirt occupation of central Bangkok in 2010 and its crushing by the military prefigured the events the Arab Spring and may thus be the better marker for Badiou's 'rebirth of history.' And this sense of foreboding was even stronger at the regional scale, since a similar intra-elite conflict would lead to civil war in neighbouring Myanmar a decade later.

41 As recorded by World Bank indicator NY.GDP.PCAP.KD.ZG.

42 Phongpaichit and Baker 2009, p. 9.

43 Ibid.

44 As recorded by World Bank indicator SL.IND.EMPL.ZS.

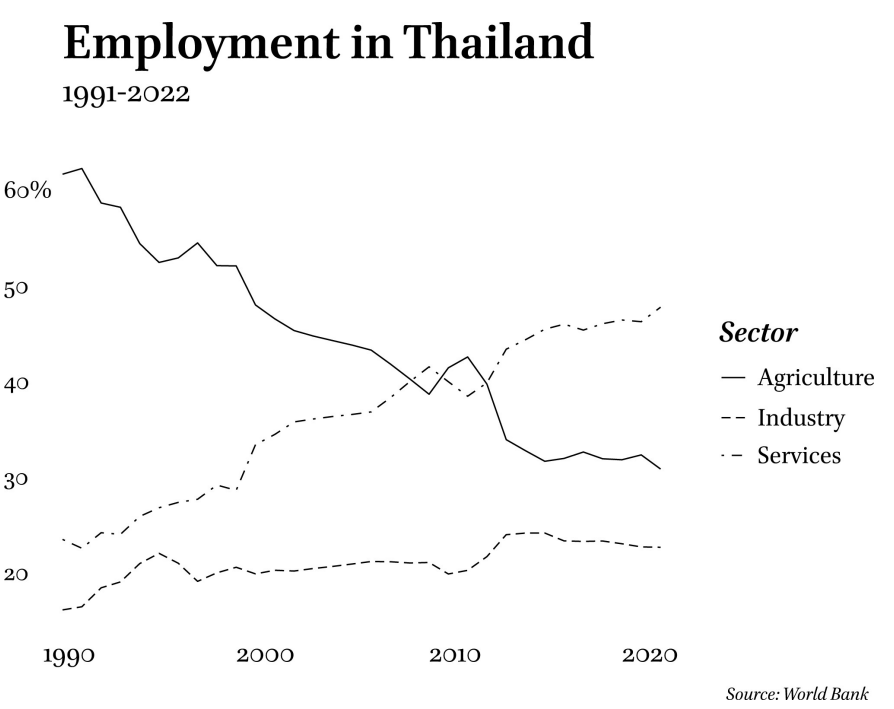

FIGURE 23 Employment in Thailand by sector, 1991–2022

was still a largely agricultural economy, with a substantial labour surplus in the countryside. Yet labour costs had also grown rapidly, with nominal wages doubling between 1990 and 1997 and real wages increasing by half over the same period.[45]

In part, the populist position proved appealing simply because it was able to recognise that the fundamental structure of this pre-crisis boom had always been warped to the needs of the total social capital, as represented by foreign financiers. But the international geography of class power was also shifting. As early as the end of the Vietnam war, Japanese capital had begun to serve as the major external stimulus for Thai industry. Initially, however, this influence was mainly visible within trade, rather than investment, with imports from Japan composing roughly a third of the total from the 1960s through the mid-1990s, concentrated in manufactures. Over those same decades, the US share declined from roughly a fifth of the total to just over a tenth. The same inversion even-

45 ILO 2007 'Thailand Labour Market Indicators, 1990–2004', *International Labour Organization*, p. 57, Fig. 32.

tually occurred within investment as well. While US firms had accounted for some 45 percent of total FDI between 1965 and 1972, against Japanese firms' 29 percent, by 1987–95 the positions had switched to 13 percent and 32 percent, respectively. The rise of Japanese FDI in these years was driven in part by the 1985 Plaza Accord's revaluation of the yen, which encouraged Japanese manufacturers to offshore production. By the 1990s, Japanese capital was then joined by investment from Hong Kong, Singapore, and Taiwan, which respectively composed 14.5 percent, 10.7 percent, and 5.7 percent of all FDI between 1994 and 1996.[46] The relative weight of FDI within the Thai economy also increased, rising from less than one percent of GDP in the early 1980s to nearly three percent in 1990.[47] Even as the US diminished as a source of investment, however, it grew in importance as the main market for the goods exported by Thailand's foreign-invested factories. Thailand's industrialisation was therefore nested within the evolving chain of elite interests that spanned the Pacific, initially seeming to follow in the footsteps of the region's other developmental projects.

But the attempts of various Thai elites to construct a developmental state remained partial. Though several administrations implemented wide-ranging industrial policies, 'the power of Thai bankers made any disciplining of financial capital implausible for the Thai state …' which also meant that it was more difficult to for planners to effectively pool and channel capital into key sectors via major financial-industrial conglomerates, as in Japan, South Korea, Taiwan, and, soon, mainland China.[48] These limits were visible early on during the administration of Prem Tinsulanond, a former general placed in power under the oversight of the king, who served as prime minster from 1980–88. While Prem's government was less beholden to US military interests, he nonetheless 'employed US economic advisers to counter more "nationalist" economic strains of thought emanating from the faction led by former Finance Minister and Deputy Premier Boonchu Rojanasthian …'[49] In the early years of Prem's administration, Boonchu's Social Action Party, which 'attracted "modern" businessmen, often in partnership with western firms' was pushed out of the ruling coalition entirely. Boonchu's 'Thailand Inc.' developmental plan was therefore shelved in favour of a more moderate alternative.[50] Under Prem, a balance was

46 Glassman 2004, pp. 93–4.

47 For context, this was only slightly lower than the figure for China during the 2000s export boom (both as recorded by World Bank indicator BX.KLT.DINV.WD.GD.ZS).

48 Glassman 2018, pp. 414–6.

49 Glassman 2004, p. 96.

50 Baker and Phongpaichit 2009, p. 242; Glassman 2004, p. 96.

instead struck 'between more and less internationalised fractions of capital, between Japanese and US planners, and between Thai capitalists and the Thai military.'[51]

Throughout this period, 'parliament was controlled through an appointive Senate packed with military men' and major generals retained control over lucrative state-owned enterprises.[52] Meanwhile, within the ideological sphere, elite legitimacy was built up in part by expanding the public role of the monarchy, which now took on 'village uplift' projects, increased the scale and complexity of its public ceremonies, and intensified its links to the orthodox Buddhist establishment, all of which would form the basis for the resurgence of royalist politics after the turn of the century.[53] Over the course of the 1980s, however, rapid growth in the private sector saw the relative power of the old military bureaucracy begin to decline. This was reflected in the structure of parliament: 'At each election from 1979 onwards, more of the MPs were businessmen, until in the 1990s virtually all described themselves as either businessmen or professional politicians.'[54] Though the first democratically elected government was then overthrown by a military coup in 1991, the coup regime was then forced out of power soon after by mass protests led by a coalition of pro-business interests and representatives of the emerging middle class, with Chamlong Srimuang (at the time serving as Bangkok governor) playing a central role.

While military links remained salient – the generals who had staged the coup, the government they had deposed, and the opposition that forced the military out of power had all been led by graduates from the country's leading military high school – the political turmoil also hinted at a more subtle shift in the centre of power within Thai society, visible in the ascendance of a new generation of elites whose wealth was more firmly rooted in commerce and industry. In a way, however, the new generation of capitalists had an even older history than that of the generals they would gradually displace. Outside the sectors controlled by the generals, commercial activity in the country had long been dominated by a relatively small number of Sino-Thai families. Though fully acculturated through intermarriage with local elites, these families could ultimately trace their heritage to the complex commercial networks that had once spanned the region during the Ming and Qing dynasties, when hundreds of thousands of migrants from southern China settled throughout

51 Glassman 2004, p. 96.
52 Baker and Phongpaichit 2009, p. 237.
53 Baker and Phongpaichit 2009, pp. 238–9.
54 Phongpaichit and Baker 2009, p. 13.

Southeast Asia 'founding their own (usually family-based) conglomerates to facilitate trade, mining, agriculture and light industry …'[55]

In Thailand, migration from southern China had begun to increase in the eighteenth century, with Chinese workers welcomed in by the monarchy to help with the reconstruction that followed the Burmese invasion in 1767. Many began as manual labourers and those who were able to save sufficient money then opened trading businesses. In the nineteenth century, many then took on roles as tax collectors, since the central government 'had auctioned the right to collect taxes on various goods and services, and allowed the tax farmers to profit by collecting more than their auction bid.'[56] Though the system was later abolished in favour of centralised collection (with the exception of the gambling, opium, and liquor industries), it provided an early source of both capital and bureaucratic connections for Chinese traders that then allowed them to enter into lines such as silk production, agro-processing, and banking.

Meanwhile, since the bulk of these early migrants were men, they gradually married into the families of local Thai elites. Their children spoke Thai, engaged in Thai cultural practices, and had access to local patronage networks, even while they also retained family connections in China and across the diaspora. Government policy encouraged this process of localisation by putting third-generation Chinese on legal parity with native Thais, such that the vast majority of Sino-Thai families had effectively become natives by the 1980s.[57] As the years went on, it also became common for these families to divide up the responsibilities of their children such that some stood to inherit the main lines of the family business while others were either enlisted in the military or sent off to school abroad, often returning to begin new ventures within the auspices of the family company. Sino-Thai business interests thereby made inroads into the bureaucracy while also expanding the scope of their commercial activity. Many early trading companies had soon evolved into large conglomerates with a number of subsidiaries operated by family members, each intricately linked into local networks of military-bureaucratic patronage.

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55 Chuang 2019a.

56 Phongpaichit and Baker 2009, p. 26.

57 Sino-Thai families therefore enjoyed relative safety and stability in Thailand throughout the period of military rule, even as countries like Indonesia, Malaysia, and Burma saw violent anti-Chinese agitation in the 1960s that led prominent Chinese families elsewhere in the region to move their assets to Hong Kong and Singapore. In fact, with rapid growth in Hong Kong, Singapore, and Taiwan, this diaspora, now dubbed the 'bamboo network' in the business press, became increasingly important to both local economies across Southeast Asia and to the industrial boom in mainland China.

Initially, these Sino-Thai families could be loosely divided into two groups: the well-established old money families who had settled in the country in the nineteenth century; and a second group who had settled in the interwar years, many of whom would gain their wealth in the postwar period. But, as time passed, the lines gradually blurred between the older and younger generations and between Thai officialdom and the Sino-Thai elite, such that 'by the end of the twentieth century, it was not just urban business families that could claim some Chinese origin, but an overwhelming majority of the whole urban upper and middle classes.'[58] The reopening of mainland China also saw a resurgence of pride in Chinese origins, with families resuming links with old relatives and travelling back to the mainland for the first time in half a century. These links also proved lucrative for business as well. Sino-Thai conglomerates entered into joint ventures with Chinese firms to gain access to both cheap labour and large markets for the simple manufactures and agricultural products that Thai companies specialised in. By the turn of the century, the triangular relationship between Asian capital in ascendant centres like Japan, Taiwan, South Korea and Hong Kong feeding FDI into Thailand, which then fed exports out to the US, was therefore accompanied by new lateral links to mainland China, where Thai firms served as major investors.

The case of Charoen Pokphand Group (CP Group) is representative of Sino-Thai conglomerates more generally. Beginning as a seed store run by two brothers who had migrated to Thailand from Shantou, Guangzhou in the 1920s, the company then expanded further into the import-export business, focusing on shipping various agricultural goods from China out to locations across Southeast Asia. Though the company was subsequently cut off from the Chinese market, the Chearavanonts retained close cultural ties to the mainland. The firm's current senior chairman and family patriarch Dhanin Chearavanont attended high school in Shantou in the 1950s and college in Hong Kong and sent his son to Taiwan to study Chinese as a child. Meanwhile, after the Second World War, the company was actively expanding its agribusiness operations in Thailand, profiting from the wave of upland agrarian settlement. By the 1970s, it had set up a vertically-integrated contract farming system in which seed and chickens were sold to farmers by the company, which would then buy back the mature birds, process the meat in its own facilities, and use its commercial network to market the final product to wholesale buyers.[59]

58 Phongpaichit and Baker 2009, p. 11.

59 As CP Group expanded internationally, the basic model would become one of the key influences for the development of the factory farm systems deployed by US firms such as Tyson and Smithfield over subsequent decades. As in the case of Taiwanese agricultural

As the export boom gained momentum, CP Group then began an even more aggressive expansion into new sectors, including aquaculture, manufacturing, petrochemicals, and telecommunications, partnering with major international brands such as Honda and Walmart. Domestically, it also expanded its retail presence through similar partnerships, acquiring the rights to run local subsidiaries of 7-Eleven and KFC. Soon it was the single largest conglomerate in the country.[60] Internationally, CP Group made gradual progress into new markets, even becoming the first foreign company to invest in China after its reopening. After this initial investment paid off, the firm then rapidly expanded its presence through a series of joint ventures operating in 26 of China's 30 provinces. By the 1990s, CP Group was often listed as the single largest foreign investor in all of China. Many other Sino-Thai businesses soon followed suit, reviving old business ties (some of which dated back to the Qing dynasty) and forging new ones at the height of the export boom.[61] And these ties have remained important to this day, with CP Group a key shareholder in major Chinese conglomerates such as Ping An Insurance.

But, by this point, the Thai boom was already faltering. The profitability of the construction and manufacturing sectors rose throughout the latter half of the 1980s, then saw a distinct decline from 1991 onward, falling to historic lows by the middle of the decade. Services followed a similar trend. As profits stagnated in most sectors, investment flowed into riskier ventures where returns remained high. The profitability of the banking, insurance, and real estate sector skyrocketed in the final years of the 1980s, overtaking the profit rates of construction and manufacturing around 1990 before reaching a plateau in the middle of the decade, when financial investments were three to four times more profitable than those in industry, and more than seven times those in services.[62] This financial sector itself both served international interests and operated under protection from the Thai state, such that 'the Thai economy … came to be dominated by an oligopolistic Sino-Thai banking elite' that set the agenda of the central bank.[63] As profits began to decline within manufacturing, this elite began to shift their capital into the more lucrative financial segments of their conglomerates and, above all, into real estate. Mean-

planning agents positioning themselves as a vanguard of anti-communist development in the Cold War (Lin 2025), projects such as the green revolution were not simply imposed on the Global South by Western interests from above but also developed by and in collaboration with subaltern elites from below.

60 Chua 2004, pp. 40–2.

61 Weidenbaum and Hughes1996, pp. 31–2.

62 Glassman 2004, p. 177, Fig. 6.1.

63 Glassman 2018, p. 416.

while, the monarchy profited through both its vast portfolio of property holdings and its stakes in Siam Cement Group and Siam Commercial Bank, with the financial bubble securing its position as the richest royal house in the world.[64]

Initially, the entire array of Thai financial interests aligned with those of international capital. The financialisation of Thai industry would help to discipline labour and better integrate Thai assets into global markets, even if it also stoked rampant inflation in property prices. Thus, over the late 1980s and early 1990s, the baht was made convertible, interest controls were removed, the stock market was gradually opened, and an offshore banking system was installed to better link Thai and international capital markets. An influx of private investment followed, as did rapidly rising foreign debt. The stock market index increased fourfold in the space of a few years. But the virtuous cycle proved short lived, and the interests of local elites soon diverged from those of investors in the wealthy countries. By 1996, foreign investment had started to decline and speculators began to bet against the baht, forcing the central bank to mobilise the entirety of its foreign reserves in an attempt to prop up financial institutions. When these funds ran out, it was forced to seek an IMF loan, on the condition that the currency be allowed to float, weak financial institutions be closed down, and freer access be given to foreign capital in previously restricted sectors.[65] Meanwhile, following the pattern seen only a decade earlier in Japan, ground rents derived from real estate had come to compose a larger and larger share of corporate revenues.

This then gave the subsequent crisis the appearance of a financial collapse induced by external forces and caused by the 'fictitious' character of finance capital. But, at its core, the crisis was rooted in overcapacity and rising competition within the global market for manufactures, which was then expressed as a detour of investment into the most prototypical of rentier industries: land development. When it became clear that the industrial pillars of the asset bubble had begun to crumble, international financial interests sent in the wrecking balls. Rather than evidence of the 'unproductive' character of finance, then, the crisis was in fact evidence of the opposite, demonstrating the violent means through which finance serves to enact capitalist power and enforce competition within industry, thereby raising productivity as a whole. Ironically, the very industrial boom that conglomerates like CP Group helped to stimu-

64 Reed, John 12 October 2020 'The king's money: Thailand divided over the $40bn question', *Financial Times*. https://www.ft.com/content/251d8aea-6939-4166-afe6-2df0176e0f8f

65 Baker and Phongpaichit 2009, pp. 257–8.

late in mainland China had now begun to outcompete the supposed 'miracle economies' of Southeast Asia, taking their place at the forefront of global development.

Structural inequalities were more important in this regard than affairs of local policy. Even if the Thai state had restrained financial excess, for example, this would not necessarily have made manufacturing more competitive, since it would have done little to drive down labour costs or upskill the workforce. Nor did Thailand enjoy the established linkages necessary to leap into leading positions within higher-end product lines, as Taiwan had, or serve as a regional financial centre, as in Hong Kong. Labour in China was cheaper and far more plentiful, and the emerging capitalist class there had even closer kinship ties to investors in the Chinese diaspora, including Thai capitalists. It didn't help that, in their scramble to orient around exports, Thailand, Malaysia, the Philippines, and Indonesia had also found themselves largely competing to gain a share in the same industrial lines serving the same end markets. As a result, there emerged 'a burgeoning contradiction between regional overcapacity and tightening global markets, which place[d] increasing pressure on all of the Asian export economies.'[66] The crisis was therefore not simply a product of wealthy multinationals plundering the Thai economy or a rapacious and parasitic financial sector raiding the coffers of the 'real' economy. After all, the feeding frenzy only began after Thai bankers and international financiers smelled blood, betting against the ability of Thai industry to secure adequate profits in the face of Chinese competition. The aborted Southeast Asian Miracle thereby demonstrated the narrowing space in which the developmental project could be pursued, with subordinate elites crowded out by one another while simultaneously subject to continual raids by established interests further up the value chain.

5 Economic Warfare

Thai workers bore the brunt of the crisis. In the space of about a year, over two million people lost their jobs. Meanwhile, even as inequality grew more and more salient, all the promises made to the various civil society groups over the course of the previous decade were gradually abandoned. But Thai capital suffered as well, with bankruptcies echoing through every sector and even the largest monopolies forced to shed assets in a frantic attempt to insulate them-

66 Glassman 2004, p. 179.

selves. CP Group had to sell off many of its major holdings and Dhanin's net wealth declined from a peak of 5.5 billion USD at the height of the boom to less than a billion in 1998, recovering only slowly thereafter.[67] The overall economy shrank 11 percent in 1998.

And yet foreign investors not only escaped the worst impacts but even used the opportunity to increase their ownership of Thai assets, which could now be purchased at a bargain. The crisis therefore reshaped the basic structure of elite power:

> Since the Second World War, the Thai conglomerates, especially those based around the major banks, had been at the core of economic growth. In the crisis, a few of the conglomerates disappeared altogether, and most others were reduced in size and importance. The big banks survived, but reoriented themselves to consumer banking and were no longer the centres of the key commercial networks.[68]

As the established oligarchy fractured, the handful of capitalists who had been less affected by the crisis now also wielded a disproportionate power. And with manufacturers outcompeted or bought out, many of the best positioned firms were now in the specific segments of the service sector that still enjoyed some form of state protection. This included media ventures, portions of the banking industry, and even real estate (since outright foreign ownership of land was still banned). But the most important was telecoms, which relied on a state licensing system that had almost completely shielded it from foreign competition.[69]

By far the most important transformation that followed from the crisis was the reconfiguration of the relationship between business and politics. The era of 'money politics' had been defined by narrow patronage and fragmented but broadly pro-business policies that fell far short of the integrated industrial strategies pursued by states elsewhere in the region. The 'Thailand Inc.' developmental project was short lived and long buried. But the catastrophic impact of the crisis finally convinced many elites of an increased need for the state to step in to protect and promote Thai industry within the global market. The basic groundwork for such a project had already been laid in previous decades, but not yet realised. For example, the new constitution sought to modernise the political system, encouraging the formation of larger parties and introducing

67 Glassman 2004, p. 191.
68 Baker and Phongpaichit 2009, p. 259.
69 Phongpaichit and Baker 2009, pp. 70–2.

a number of new checks and balances intended to stem corruption. But the crisis also devastated the Democrat Party, the most successful of those already in power. Meanwhile, after a decade of reform, there was little faith in the old military bureaucracy. This left a vacuum at the heart of the newly democratised political system, providing an opening for those capitalists who had survived the crisis relatively unscathed to sculpt a state better able to serve their needs. But, in so doing, they were confronted with an increasingly volatile mass politics that was no longer easily repressed by the military. This new generation of elites would therefore be forced to graft their state-building projects onto populist political programs that promised to improve the lives of common people, especially in the countryside.

The tone of politics had similarly shifted against unrestrained liberalisation. Rather than win-win globalisation, Thai elites now spoke of rising industrial conflict in increasingly militaristic terms. Though supported by more established figures like Dhanin, it was Thaksin who led the charge. In his own words:

> We have just come out of the Cold War between communism and the free world. From here onwards it will be an economic war, and no less brutal. In the past, countries were seized as colonies by using gunboats and troops … Nowadays the mode of warfare has changed. It is about the movement of capital and the use of technology for economic competition. It is not territory that is seized but the economy … And from 2000 onwards, this war will be more violent.[70]

In the wake of the crisis, however, Thaksin was essentially the only Thai industrialist in a position to respond to his own call. Once the crisis hit, companies under the Shin Corp umbrella still made losses, but only sold off a small share of their assets – and these to Singaporean firms with which the Shinawatra family would retain close ties. Thaksin's three major listed companies even turned a profit in 1998. By 1999, their revenues had fully recovered, and they were eagerly raising new capital when other Thai investors were licking their wounds. Thaksin himself was placed on the Forbes 500 in 2001, when his net worth rose to around two billion USD.[71] He therefore entered politics at the height of his wealth.

While the early political manoeuvres of the surviving Thai elite had no explicitly populist dimension, their anti-Western pivot soon placed them in line with

70 Quoted. in Phongpaichit and Baker 2009, p. 69.
71 Phongpaichit and Baker 2009, pp. 56–9.

the 'temple wing' of the Phalang Tham (moral force) Party founded by Chamlong.[72] Their anti-imperialist language also attracted former student radicals who had fled to communist bases in the countryside after the military massacre at Thammasat University in 1976 and, after their surrender, had returned to work in NGOs, serve as minor government officials, or even entered business. This blurring of left and right, accompanied by the failure of civil society organising in the face of the crisis, slowly and loosely aligned all these forces behind a more general project of political recomposition led by the elites that had weathered the crisis most effectively.

The initial vehicle for the new politics was the Thai Rak Thai ('Thai Love Thai', TRT) Party, founded by Thaksin in 1998. The TRT's nationalist underpinnings are clear enough from its name. But the party ultimately drew its power less from any well-established national mythos and more from public ire against international capital:

> A sense of resentment against outside forces (globalization, the IMF) developed but faced difficulties finding clear expression. Thailand had no mass nationalist movement in its history. The elite had fended off colonialism, the nation had been formed top-down, and national symbols had remained 'official property,' not easily appropriated for mass action.[73]

Invoking these national symbols in an entirely new fashion, the TRT was able to quickly build up a mass base among both the scorned ruralites who had led civil society agitation throughout the 1990s and among the small- and medium-scale capitalists who were particularly hard-hit by the crisis.

Thaksin drew from the emerging nationalist discourse and the popular business press to propose that business school management be applied to the running of the national economy, with recovery premised on both an active state and the unleashing of pent-up entrepreneurial energies. Early TRT policy therefore placed 'the emphasis on SMEs, and the combination of local skills and inputs with high technology in production and marketing.' Meanwhile, a 'new

72 Thaksin's history with Chamlong and Phalang Tham is somewhat more complicated, with his entry into the party in the mid-1990s splitting the more radical right-wing base, tanking membership, and ultimately resulting in Chamlong leaving the party. Though the financial crisis would again unite Thaksin's liberal developmentalist project with the communitarian localism of the temple wing, these same tensions would form the basis of their subsequent divergence into the clashing populisms of 'red' and 'yellow.' (Phongpaichit and Baker 2009, pp. 55–65).

73 Phongpaichit and Baker 2009, p. 76.

nationalist' group within the party held public lectures, where thinkers associated with the movement 'argued that "new" nationalism was not based on the imagined ethnic identity that had led earlier nationalists towards race hatred, fascism, and wars of nationalist expansion' but instead that 'new nationalism's enemy was international capital, which had taken advantage of the crisis to invade Thailand on an unprecedented scale.'[74] Economically, the strategy was posed in purely defensive terms and still took entry into the global economy as the ultimate goal, echoing the developmental stages laid out by List a century and a half prior: 'Less advanced countries needed to integrate with the world at their own pace so that they could participate "on fair and equal terms" and retain their cultural identity.'[75] But controlling the pace of integration required a state capable of acting in service of Thai industry.

Thus, Thaksin's project was nationalist in two senses: first, it was buoyed by the more general nationalist sentiment that had emerged in response to the crisis and had begun to forge a certain sense of national identity out of the reaction to international capital. Second, it aimed to construct an integrated nation-state and modern party system out of the fragmented patronage networks that had long formed the basis of Thai governance. Since the majority of the electorate still lived in the countryside, this system would also have to incorporate the demands of the ruralites who had come to form the most active force in mass politics. In fact, the rural question became even more pressing in the years after the crisis than it had in the tumultuous decade that preceded it. Without unemployment insurance or other forms of social welfare, many who were laid off in the cities returned to the countryside, driving 'the rural poverty rate up from 14.9 per cent of the population in 1996 to 21.5 per cent in 1999 …'[76] Thaksin himself was particularly well-positioned to lead this effort, at least in terms of his public image. On the one hand, he was the scion of an old money Sino-Thai family with substantial connections to the military bureaucracy that would allow him to integrate many different elite interests in a single developmental drive. On the other, his family had mostly operated at the local level within Chiang Mai (Thailand's second-largest city, located in the rural north), which allowed him to narrate his own success as an underdog story of an outsider with a humble and somewhat provincial background disrupting business as usual in the big city.

74 Phongpaichit and Baker 2009, p. 78.
75 Phongpaichit and Baker 2009, p. 79.
76 Glassman 2004, p. 189.

6 Thaksinomics

Despite this narrative and his later nationalist rhetoric, however, Thaksin's early success was largely achieved by serving the interests of established firms in the wealthy countries. In fact, he had essentially begun his business career as a middleman linking entrenched state interests in Thailand to American capital. His first entrepreneurial venture in the early 1980s was simply to lease IBM computers to the police and other government agencies. He then went on to operate an AT&T subsidiary's pager service before selling his shares and using his connections to set up his own pager company. By the end of the decade, he had secured a government concession to set up a new cable company of his own, as well as a data networking service.[77] Soon, these business interests were integrated into a more expansive telecommunications firm which, after securing a 20-year monopoly concession from the government, found itself operating what would become the country's largest mobile phone service. He also built new business relationships across the bamboo network, especially with financial interests in Singapore.

His established connections with overseas capital were crucial when, in 1990, he decided to branch out further into the satellite industry, signing a contract with US aerospace firm Hughes to develop, launch, and operate several communications satellites. Over the subsequent years, several of these businesses were floated on the stock market, and soon Thaksin had consolidated them into a new family holding company, Shin Corporation, which also controlled a substantial real estate portfolio. Throughout, he continued to build up connections within the government as well, including lucrative links with the Thai Military Bank (which had provided his first loans) and with figures such as Thanong Bidaya, a former employee of the bank who was serving as finance minister at the time of the crisis.[78]

After a bit of minor dabbling in the political world earlier in the '90s, Thaksin jumped head-on into politics in the wake of the crisis, founding TRT and mobilising his new wealth to fund his presidential bid on the party's platform for the 2001 election. Unlike other parties, which largely focused on handing out local kickbacks and advertising through established channels, TRT's 2001 cam-

77 Phongpaichit and Baker 2009, pp. 40–51.

78 Aside from operating in more robust sectors, other portions of Thaksin's portfolio were suspiciously saved from the crisis by his own decision to hedge his investments against the baht in the months leading up to the crash. Many claimed that Thanong had warned Thaksin of the decision to float the baht ahead of time, allowing him to escape more or less unscathed.

paign was extensive, coordinated, and polished. The party program itself was split between serving the interests of its elite backers and offering a series of business-oriented development programs that also met popular demand for relief measures aimed at the common people. Though the party had not yet fully embraced the full potential of the growing populist energy, it was nonetheless already closely linked to its mass base: 'The party contacted NGOs and rural activists to help compile an election programme of agrarian debt relief, village capital funds, and cheap health care … [and] adopted the localist vocabulary of community empowerment and bottom-up grassroots development.'[79] It also promised to expand rural internet access, assist small businesses, and return to negotiations with the Assembly of the Poor. This won it the support of civil society leaders such as Prawase and resulted in relatively strong electoral returns in the country's rural areas, particularly in the Northwestern districts surrounding Thaksin's hometown of Chiang Mai.[80] Despite its two-faced nature, the party's close collaboration with relatively grassroots NGOs at least approximated the style of collaborative governance that many within civil society had long been advocating for.[81] Elements of the TRT program even seemed to gesture in the direction of the 'Social and Solidarity Economy' that had gained popularity within social movement circles those same years.[82]

But the party's fundamental aim was to restore growth. This involved setting up a state-run management corporation 'to restructure the debts of commercial banks and relieve them of some of their non-performing loans' and the 'establishment of a 58 billion baht emergency fund to assist financially strapped firms in labour-intensive industries.'[83] And these were the policies that won it the continuing support of other major capitalists, including the Chearavanont family and the heads of key Thai banking firms, such as Chatri Sophonpanich

79 Baker and Phongpaichit 2009, p. 263.

80 Baker and Phongpaichit 2009, pp. 264–5.

81 It is ultimately incorrect to portray the TRT or Thaksin as true believers in any sort of populist project. They were instead 'reluctant populists,' forced to appease an increasingly dissatisfied population in the wake of the crisis. A more detailed account of the populist character of Thaksin's administration is offered in: Hewison 2017.

82 The concept itself was a case-study in the defeat of the twentieth-century communist movement: it began as a relatively radical framework put forward by certain anarchists in the Spanish Civil War, was then adopted by community organisers in Latin America attempting to survive under military dictatorships and, from there, was finally absorbed into anti-communist civil society discourse when it was popularised by the UN and ILO around the turn of the century. By the late 2010s, even the World Bank had begun releasing reports using the concept.

83 Glassman 2004, p. 190.

of Bangkok Bank. Similarly, many of its rural projects were designed not simply to offer social services but to better integrate ruralites into the market economy. Farmers were encouraged to become entrepreneurs, with government agencies launched to encourage the formation of rural SMEs and promote regional product specialisation. Villages were awarded one million baht from the Government Savings Bank for local development projects formulated by villagers and approved by government committees.[84] The new administration also attempted to channel liquidity toward rural business. Agrarian debt relief was financed by the state-owned agricultural bank. Other government banks provided credit for real estate companies and SMEs. Most importantly, the state encouraged commercial banks (both domestic and foreign) to increase their consumer lending, easing regulations on credit cards and loans for housing and automobiles. Consumption boomed as a result, alongside household debt.[85]

Meanwhile, the TRT pursued an even more fundamental transformation of the state itself. Provincial governors were brought in for training sessions in modern business management and made to 'draw up a provincial plan on the model of a corporate business plan,' with the economic performance of their provinces closely appraised.[86] Thaksin dubbed himself a 'CEO prime minister' and hired foreign business consultants to propose programs that would increase the competitiveness of Thai industry.[87] By 2003, the government had also taken on a number of major infrastructure projects including new urban transit systems in and around Bangkok, high speed rail extensions, a series of new bridges and highways, and an expansion of existing seaports and airports, including an attempt to turn Chiang Mai into 'an international aviation hub.'[88] Though these projects would lead many to describe the government's policies as 'Keynesian,' even its most expansive welfare programs – such as the extension of free healthcare to those below a certain income – were not funded through traditional fiscal means. They therefore required no major increase in taxes on the wealthy and left the formal government budget unaffected. Public programs were instead financed using 'quasi-fiscal' techniques that combined state-directed credit from for-profit banks with various other forms of internal arbitrage such as using the stock market to sell off minority shares in state-owned companies – a process of 'corporatization' that mirrored the

84 Ibid.
85 Phongpaichit and Baker 2009, pp. 104–9.
86 Phongpaichit and Baker 2009, p. 188.
87 Baker and Phongpaichit 2009, p. 266.
88 Phongpaichit and Baker 2009, pp. 127–8.

one occurring under Zhu Rongji's administration in China in the same years, albeit one ultimately limited by the comparatively smaller quantity and size of Thai SOEs. Following in the footsteps of developmentalists before him, Thaksin described the model as 'social capitalism' or even as the 'coexistence of socialism and capitalism,' claiming to be 'applying socialism in the lower economy, and capitalism in the upper economy.'[89]

In reality, Thaksinomics was premised on deepening capitalist relationships at every level of society. But this required different strategies within different sectors. At the base, it involved 'a grand scheme to "turn assets into capital," meaning increasing the forms of property which would be used as collateral for loans from banks.' Central to this plan was the land ownership reform that had long been called for by rural civil society groups, 'ensuring that all landowners had a full title deed rather than some more qualified document or no document at all.'[90] Similar documents were conferred for other forms of ownership, such as a vendor's use of market space. At the same time, formerly illegal or grey-market businesses were integrated into the formal economy and small-scale economic activities such as street hawking or motortaxi driving came to form the grassroots basis of the post-crisis revival. Onerous rules and regulations were lifted for those seeking to start a business, and the judicial system was reformed to be more accessible and efficient in managing property disputes. Even the free healthcare scheme was intended to free up villagers' cash for consumption or for bank deposits that would then be used as 'quasi-fiscal' sources of finance. Meanwhile, cheap services and a developed money economy helped attract international tourists, adding a much-needed injection of foreign funds.[91]

Even if the quasi-fiscal financing methods required no substantial increase in new taxes, the formalisation of property rights was nonetheless accompanied by a refinement of the tax regime itself, with the efficiency of tax collection enhanced through a new inspection system targeting the large number of businesses (most of them the smaller ventures of middle-class entrepreneurs) that declared losses on paper in order to get out of paying. This also created a formal system for appraising the balance sheets of businesses that had previously been run on more or less informal terms.[92] Throughout, the reforms also adopted what Thaksin described as a 'dual track' strategy, with the state-directed deepening of capitalism at the lower rungs of society (ironically described

89 Phongpaichit and Baker 2009, pp. 118–20.
90 Phongpaichit and Baker 2009, p. 117.
91 Phongpaichit and Baker 2009, pp. 115–17.
92 Phongpaichit and Baker 2009, p. 265.

as 'socialism' by Thaksin and others) accompanied by continued openness to international capital in the upper echelons of the economy. After all, despite its nationalist rhetoric, the TRT government was ultimately led by businessmen who had extensive international interests. More importantly, given the limited size of the Thai economy, the only way to secure rapid growth was to attract foreign investment and sell Thai goods and services on the global market. Thus, Thaksin's administration engineered a controlled devaluation of the baht designed to give Thai manufactures an edge on global markets. Thai diplomatic teams travelled all over the world attempting to solicit investment. With Chinese growth booming, however, trade between Asian countries was growing faster than world trade, and many of these efforts therefore took on an increasingly regional character.

Thaksin's administration helped to push through early free trade agreements with other ASEAN countries and with those in South and East Asia.[93] Poorer neighbours also became crucial sources of cheap labour and raw materials. In addition to the established Lao and Lao-Thai migrant population from the Northeast, migration from Myanmar had increased in importance by the turn of the century, with SEZs set up in border territories such as Mae Sot employing undocumented Burmese workers in informal garment sweatshops, many of which were run as subsidiaries of Bangkok-based enterprises. Overall, by the early 2000s the Thai economy had 'become increasingly reliant on cheap migrant labour, and labour supply problems have only been eased through the influx of migrant workers, both legal and illegal.'[94] Ironically, globalisation itself thereby gave the Thai military a renewed role in society. With hundreds of thousands of migrants crossing the Burmese border (which was also a site for illicit trade in drugs and other illegal goods), 'policing these borders became a major part of the army's official role, and also an avenue for unofficial earnings.'[95] Anti-drug and anti-smuggling efforts soon became the biggest military campaigns since the anti-communist crackdown, with a number of officers starting their own companies to launder money seized from illicit trade.[96] Rather than growing more self-sufficient, both the old military-bureaucratic interests and the those of the modern capitalists thereby became increasingly inseparable from international flows of value.

93 Phongpaichit and Baker 2009, pp. 121–25.
94 Arnold and Hewison 2005.
95 Baker and Phongpaichit 2009, p. 250.
96 Ibid.

7 The Rift

Although the initial returns of the developmental program were significant, they nonetheless failed to revive the boom. No amount of entrepreneurialism was ultimately able to replace investment lost to competitors operating in China (and, later, Vietnam, Indonesia, and Bangladesh), where costs remained significantly cheaper. Under Thaksin's administration, annual GDP per capita growth averaged 5.3 percent between 2002 and 2006, with its 2003 peak of 6.3 percent just below the pre-crisis average but also well below the peaks reached at the beginning of the export boom. Private investment showed a similar pattern, rising from a low of 10 percent of GDP in 1998 to 15 percent by 2003, which was less than half that seen prior to the crisis.[97] Nor was there any substantial boom in new outlays on plant and equipment, with gross fixed capital formation rising from a low of 20 percent of GDP in 1999 to a new peak at 28 percent in 2005 that was nonetheless well below the 40 percent that had prevailed throughout much of the 1990s.[98]

Regardless of the new nationalist language, then, 'the trajectory of the post-crisis economy was largely determined by exports of goods and services (especially tourism), which had much more impact on GDP than consumption or investment.'[99] Ironically, a large portion of Thailand's new exports in this period were industrial inputs destined for China. Another substantial segment travelled in the other direction along emerging regional chains, with growing exports of chemicals, fibres, foodstuffs, and consumer goods to South Asia. Finally, the very beginning of the commodities boom also boosted prices for established agricultural goods and other raw materials.[100] Despite its large working-age population, other structural factors such as high labour costs, messy governance, and intense international competition within manufacturing seemed therefore to have placed the country in an indefinite state of stalled development, soon to be known as the 'middle income trap.'

Perhaps the most crucial failure of the TRT developmentalist program, however was not its inability to revive the export boom so much as its tendency to stoke populist energies that seemed to grow increasingly uncontrollable. Though successful in inducing a lesser growth spurt, in the minds of both the old military bureaucracy and a rising royalist middle class, the returns of this growth were distributed both too narrowly (among the new business elite)

97 Phongpaichit and Baker 2009, p. 126.
98 According to World Bank indicator NE.GDI.TOTL.ZS.
99 Phongpaichit and Baker 2009, p. 127.
100 Ibid.

and too broadly (among the populace). Meanwhile, the centralisation of state power necessary to induce development also, by its very nature, increased the power of Thaksin, his family, and the bureaucrats, generals, and capitalists who were personally closest to him. During the first TRT administration, the Chearavanont family saw its wealth doubled from its post-crisis low, with Dhanin climbing back into the billionaire's club. Within the banking sector, early supporters of TRT such as Chatri's Bangkok Bank tended to see more of their non-performing loans transferred into state holding than banks affiliated with other elite factions.[101] Within the military realm, Thaksin's favouritism was even more brazen. He openly bypassed those with seniority to promote family members and former classmates, vastly reducing the influence of established generals. He also began to gradually shift armed power away from the military and toward the police, with military command in border provinces handed over to special police agencies tasked with cracking down on drug dealers and 'bandits.'

Once in power, Thaksin even pushed to roll back many of the checks and balances that had been established in the 1990s, openly expressing his admiration for the business-friendly authoritarian democracies of Singapore and Malaysia.[102] Finally, despite Thaksin himself ostensibly stepping away from business, the Shinawatra family fortune tripled during his first four years in office.[103] The family had also used its relatively powerful position during the crisis to buy up cheap real estate, with its property holdings totalling 5.5 billion baht in 2001 and only growing in value from there.[104] In 2006, ostensibly in order to distance the Shinawatra family from its business interests, Shin Corp itself was sold off to Singapore's sovereign wealth fund, Temasek. But, since the sale was conducted via tax haven shell companies, Thaksin's children (the main stockholders) paid no taxes on the transaction.[105] The deal would be the last straw that triggered the coup that same year.

Meanwhile, Thaksin had pursued a number of aggressive policies that would provide critics with abundant evidence of government repression. The deadliest of these was the 'war on drugs,' aimed at shutting down illicit trade in meth smuggled across the border from Myanmar and cracking down on the low-level insurgency in the country's south, funded in part through the narcotics trade. During the campaign, government blacklists were jointly drawn up

101 Glassman 2004, pp. 192–3.
102 Baker and Phongpaichit 2009, pp. 267–9.
103 Baker and Phongpaichit 2009, p. 267.
104 Phongpaichit and Baker 2009, p. 214.
105 Phongpaichit and Baker 2009, pp. 260–3.

by police and village heads, and thousands of suspects were later found dead with gunshot wounds.[106] While the 'government claimed drug dealers were shooting one another,' it was equally likely that 'police had been incentivised to kill people, guilty or innocent, to meet performance targets.'[107] The pattern resembled the extra-judicial killings of earlier campaigns against communists and rural organisers – likely not a coincidence, as some of the officials who designed the anti-drug campaign were military figures who had been involved in counterinsurgency during the Cold War.

Despite the violence, however, the campaign itself proved extremely popular, with opinion polls finding two-thirds to 90 percent of respondents in support at the height of the killings. Even 70 percent of Buddhist monks were in favour of the policies, many of which targeted Muslims in the south.[108] Similarly, Thaksin's administration expanded controls over the media. Television and radio channels were ordered to change the tone of negative news broadcasts, state media attacked public intellectuals who criticised the government, NGOs were portrayed as pandering to foreign interests, and 'groups that continued attempts to defend their local interests were described as 'anarchists' and enemies of the nation.'[109] Combined with the TRT government walking back its promises to meet the demands of civil society groups such as the Assembly of the Poor, many within NGO circles now began to criticise the authoritarian character of the administration.

Even while the TRT government proved unable or unwilling to fulfil some of its more radical campaign promises, the party nonetheless doubled down on its populist marketing in the lead-up to the 2005 election, with the result that it not only retained but substantially expanded its popular support. The party won the election by a landslide, taking enough parliamentary seats that they would not be forced to form a coalition government and thereby making the TRT 'essentially the first political party project in Thai history to form a popular base and achieve a broad, continuing mandate.'[110] Combined with increasing political controls over the bureaucracy and a strengthened executive, this at last seemed to have moved the country toward a more modern system of government 'in which the dominant element was a large political party financed by business.'[111]

106 Phongpaichit and Baker 2009, p. 161.
107 Baker and Phongpaichit 2009, p. 267.
108 Phongpaichit and Baker 2009, pp. 163–7.
109 Baker and Phongpaichit 2009, p. 267.
110 Glassman 2018, p. 613.
111 Phongpaichit and Baker 2009, p. 173.

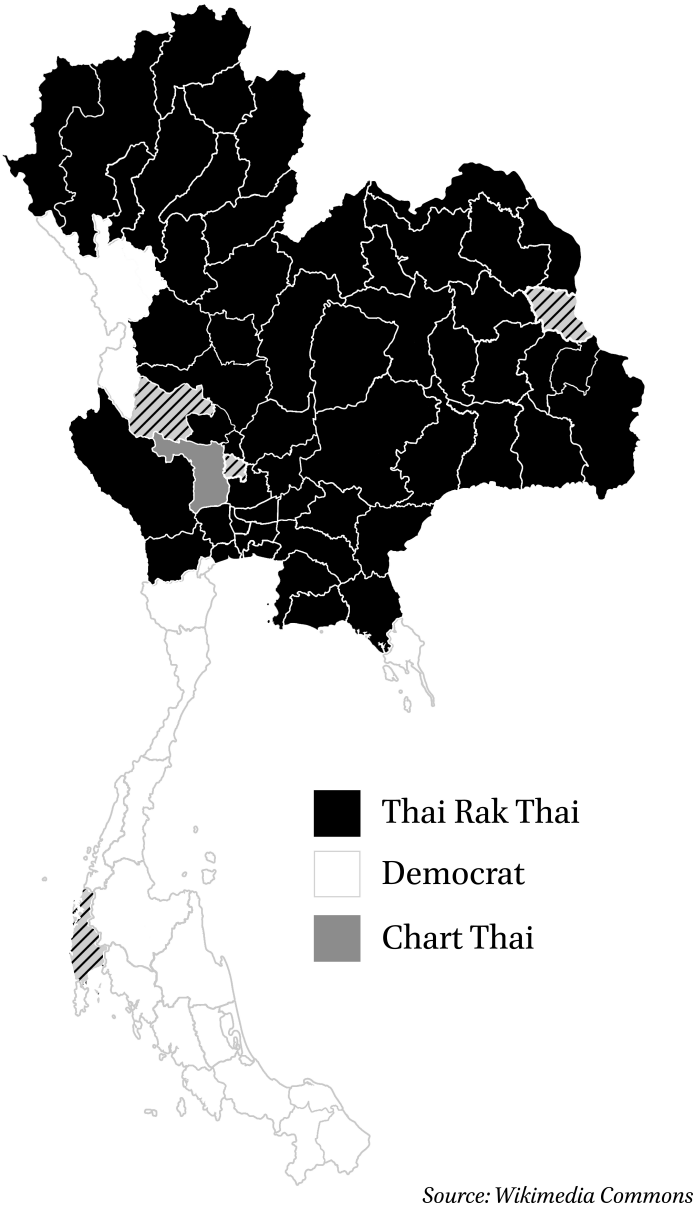
But, by stoking populist passions, the party had also helped to cultivate a far more dangerous class politics which it would struggle to contain. Maybe more importantly, while NGOs continued to play central roles in mass mobilisation, the methods and themes of emerging protests also began to overspill the boundaries of anodyne civil society organising. Within the 'remarkable and convoluted political crisis that ensued,' armed confrontations soon became increasingly common.[112] Rather than simply protesting authoritarian overreach and raising awareness of isolated issues, politics now began to address more concrete questions of social power and the distribution of wealth. At the same time, however, this nascent class politics was also hindered by its populist costume. Rather than seeing in their grievances a shared proletarian condition, both sides of the emerging split invoked the integrity and sanctity of the Thai nation, which meant that their popular bases of support ultimately remained subordinate to the competing elite factions speaking on behalf of the national project while perpetuating the very domination that they ostensibly opposed.

On one side, the very popularity of Thaksin's administration would produce a reactionary 'yellow' alliance between the royalist technocracy and its base of urban professionals. While the TRT government had clearly sidelined the older military-bureaucratic elite in favour of modern business interests, the populist promises of the party also stoked fears that 'the middle classes were losing political influence, and would find themselves paying for both Thaksin's populist handouts and his coterie's inflated business profits.'[113] This gradually split the populist base of the party, with the old 'temple wing' associated with Chamlong and fundamentalist Buddhists such as the Santi Asoke sect first distancing themselves from Thaksin's government and then slowly cohering into an organised adversary. A new grouping of NGOs protesting the government's enthusiasm for free trade agreements and its attempts to attract new rounds of FDI from Japanese and US firms was also drawn into the opposition, alongside organised labour in state-owned enterprises set to be privatised.[114] At the ideological level, support for the monarchy and promotion of a localist sufficiency economy became the basic themes mobilised against the liberal developmentalists. This also explains their base of support, since it was the very distance from the realities of rural life that allowed the agrarian myth to take root in the imaginations of urban professionals, thriving alongside a conservative fear of the rabble. The utopian fantasy of the 'sufficiency economy' was therefore

112 Glassman 2018, p. 613.
113 Baker and Phongpaichit 2009, p. 269.
114 Phongpaichit and Baker 2009, pp. 229–30.

Thai Election Results

2005



Source: Wikimedia Commons

MAP 10 Thai election results, 2005

mostly promoted by 'cultural elites, bureaucratic planners, military brass, religious fundamentalists, and seasoned intellectuals – who do not support themselves by means of culturally-based, subsistence family farming.'[115]

The increasingly authoritarian overreach of the Thaksin government only intensified middle class fears, with another round of press crackdowns causing media tycoon and TRT critic Sondhi Limthongkun to mobilise a series of popular street demos after being kicked off the air in 2005. Though these protests soon fizzled out, Sondhi soon joined Chamlong and others in forming the People's Alliance for Democracy (PAD), supporters of which were known for wearing yellow shirts as an homage to the monarchy. The PAD then coordinated a larger series of mobilisations in 2006, which built up an illusion of popular discontent that was then used as the official justification for the military coup that ousted Thaksin with the blessing of the King – with many suspecting that Prem, now president of the privy council advising the monarchy, had masterminded the transfer of power.[116] Soon after seizing power, the military government drafted 'a new, more restrictive constitution that made some of the Senate appointed and made it easier for the courts to disband parties the elites disliked.'[117] Old anti-communist practices were also revived, as 'special army teams were sent into the villages in the north and northeast to "persuade" people to drop their support for Thaksin and the TRT.'[118] When that didn't work, the party itself was disbanded and a number of its leaders banned from running for office. Without widespread support among the poor, however, PAD-aligned politicians would repeatedly and ironically run up against a basic inability to win elections anywhere outside of central Bangkok or the Southern provinces.

Internally, PAD members debated different ways to move the electoral system away from the one person / one vote model that doomed them at the polls. Seemingly inspired by the electoral system in Hong Kong, Sondhi proposed a parliament split between elected and appointed seats, with occupational constituencies replacing territorial ones. Similarly, he advocated for the military to be placed under direct command of the crown. Others proposed property qualifications for voters, believing that the poor were not qualified to make political decisions since they were too easily 'tricked' by populist promises.[119]

115 Dayley 2011, p. 348 and p. 343.
116 Baker and Phongpaichit 2009, p. 269.
117 Glassman 2018, p. 614.
118 Baker and Phongpaichit 2009, p. 271.
119 Phongpaichit and Baker 2009, p. 332; This position was also very clearly debunked by surveys conducted before and after the 2011 election, which actually showed the opposite: the most knowledgeable and informed of all voters in the country were those in the northeast,

Meanwhile, the old generation of military bureaucrats were returned 'to the boards of state enterprises, and to other positions of influence … the allocation to the military was raised by almost one half [and] ambitious projects for buying arms resurfaced.'[120] Despite these measures, the new government would nonetheless struggle to govern without a popular mandate. Shortly afterwards, TRT rebranded as the People's Power Party, which again won the first post-coup elections in 2007. Thaksin returned to the country. Another round of middle-class demonstrations was called, with protestors occupying the Government House and the airports and the military refusing orders to dislodge them. In response, the courts disbanded the People's Power Party, effectively handing power to the minority coalition led by the Democrat Party, which appointed Abhisit Vejjajiva to be prime minister in 2008, shortly after the world fell into yet another severe economic crisis.[121]

In the eyes of the elite, middle class protests in support of a military coup were ultimately among the lesser evils unleashed by the return of history. The real threat remained the poor ruralites, migrants, and urban precariat who had catapulted the TRT into power. This sleeping historical party had already begun to stir in the agitational, issue-based protests of the 1990s, when a broader class consciousness had remained sedated only due to the fairly recent defeat of the communists and their replacement by an internationally-funded liberal coterie of civil society leaders. Unlike in the era of jungle warfare, however, the city was now no longer so easily separated from the countryside. The export boom had provided new opportunities for urban employment, while remittances had boosted rural incomes. Following the crisis, the language of the social movement slowly gave way to more conflictual themes of class conflict and anti-imperialism that increasingly spanned the urban-rural divide. The TRT didn't bring this awareness into being. Instead, Thaksin's gambit was simply to mobilise class resentment first as a threat against the old guard elite and, second, as an engine for the new developmental state. Again, we return to Tronti's fundamental thesis that the working class is and always will be the living ferment of capital, driving forward its development through ongoing struggle. If anything, then, Thaksin's was a strategy of careful cooptation, attempting to redirect righteous but destructive anger into a productive entrepreneurialism that could give Thai industry an edge over its international competitors.

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who outperformed Bangkok voters in their knowledge of the main candidates and issues at stake in the election (Eugenie 2016).

120 Baker and Phongpaichit 2009, pp. 2712.

121 Glassman 2018, pp. 614–5.

8 Red Tide

Despite its strategy of doubling down on populist themes in the lead-up to the 2005 election, the increasingly obvious divergence between the rapidly rising wealth of the capitalist class and the much more moderate, or even nonexistent, gains enjoyed by the common people would soon begin to stoke popular demands in excess of official TRT policy:

> The degree to which Thaksin raised political expectations among millions of previously marginalised Thais was eventually problematic for Thaksin himself, given that TRT had not aimed to create a radical or militant political movement – indeed it had not even aimed to directly challenge the symbolic authority of the monarchy.[122]

In other words, populist politics had reached a point of oversaturation, with neither liberal developmentalism nor localist utopias able to fully blunt the underlying sharpness of class politics. The emergence of the United Front for Democracy Against Dictatorship (UDD) in response to the 2006 coup was therefore not simply a sign of the TRT's enduring appeal among the common people but also the first signal that Thaksin's populist experiment had awoken something much more dangerous. In response to PAD protestors' adoption of yellow, the colour of the monarchy, UDD leaders would soon appear in red, the colour in the national flag that represents the people, thereby giving the movement its 'red shirt' moniker.[123]

The PAD mobilisations in 2006 had also changed the tactical terrain of street protest. While the use of volunteer guards armed with sticks had been common in Thai demonstrations since the 1990s, the PAD occupation camps were the first to employ paid thugs as guards, many of whom 'were recruited among ex-soldiers and ex-policemen' with others likely coming 'from the floating underclass of the city' and later 'fortified with men from the private bodyguards and "security" forces of powerful figures including ex-generals and provincial godfathers,' all of whom were much more heavily armed. Among their favoured weapons were golf clubs, 'expensively engineered playthings of the rich transformed into lethal lumps of metal with a useful handle.'[124] From 2008 onward, armed confrontations between supporters of the unelected Abhisit government and supporters of Thaksin's deposed parties became common, with war-

122 Glassman 2018, p. 614.
123 Phongpaichit and Baker 2009, p. 337.
124 Phongpaichit and Baker 2009, p. 325.

ring media outlets actively stoking enmity among their antagonistic audiences. In an increasing number of cases, these clashes had even begun to take on the character of minor street warfare. For example, in November of 2008, just prior to the fall of the elected government, a squad of right-wing PAD supporters 'clashed with a group of taxi drivers on the city's main northern radial road. Cameras captured a truck-borne PAD guard in a yellow armband repeatedly firing a pistol, while another beside him let loose with a slingshot, and a third stood behind holding aloft a picture of the King.'[125]

Learning from this example, the red shirts began to adopt a similar policy of defensive armament, with 'renegade' former military general Khattiya Sawasdipot (yet another figure who had once led anti-communist campaigns) coordinating the most militant wing of protestors in armed defence efforts that often turned into running battles with yellow shirt opponents. Khattiya was suspected of coordinating grenade attacks on PAD encampments in 2008 and leading troops in nightly clashes with PAD supporters. Over the next two years, armed confrontations only grew more common. Meanwhile, UDD leadership rebuilt its electoral capacities within the new Pheu Thai ('For Thais') Party – with each electoral region overseen by one of Thaksin's four siblings – and funnelled money into red shirt media outlets, including a new television channel devoted to broadcasting talks by UDD leaders and recaps of recent rallies.[126]

Economic conditions in the wake of the Great Recession now also allowed party propaganda to easily counterpose the relative prosperity of the Thaksin years to the more dire conditions that the country faced as GDP growth turned negative between 2008 and 2009. Soon, tens of thousands were attending rallies in Bangkok and Chiang Mai, many bussed in from rural areas. Taxi and motortaxi drivers also became increasingly important figures in these protests, mobilising their intimate knowledge of the city to quickly transport demonstrators or blockade key sections of the city. In 2009 during Songkran (Thai New Year), a wave of red shirt protests shut down key junctions in the transport network, erecting barricades of burning tires. In response, the government launched 'the largest riot control action ever mounted by the Thai armed forces,' with the military sweeping through the city 'firing in the air for terrifying effect, with some limited use of tear gas and water cannons.'[127] Red shirt protestors defended their barricades by 'hurling bottles of petrol,

125 Phongpaichit and Baker 2009, p. 339.
126 Phongpaichit and Baker 2009, pp. 340–48.
127 Phongpaichit and Baker 2009, p. 349.

launching commandeered buses towards the troops with their engines running, and exploding cylinders of cooking gas. Three trucks of liquid gas were commandeered as potential bombs, but not used. Fifty-two buses were crashed or burned.'[128] Though ultimately quashed by the military, what came to be known as 'Bloody Songkran' would prefigure the events of 2010.

Any simple summary of the 2010 occupation proves elusive. Mainstream media narratives invariably portrayed it as either a noble struggle for 'democracy' or as a more complex drama showcasing a 'divided nation.' Emphasising the class element or the regional divide offers a better account of the basic dynamics. But, at the same time, an overly simplistic story of clearcut conflict between the lower and middle strata of the class (between 'peasants' and 'professionals') or between north and south fails to capture both its complex social composition and protean politics. While it is true, for example, that poorer ruralites in the north formed the fundamental base of electoral support for TRT, the party was also popular among better-off farmers and landowners throughout the region, many of whom became enthusiastic red shirts. Nor was support for Thaksin himself a unifying factor. Nostalgia for greater government support during Thaksin's administration was often paired with a recognition that, although material life had improved, it had improved much more for some than others. More importantly, these gains had only come at the cost of increased stress, precarity, and social inequality across the board. Though the occupation had an obvious class character, then, class was experienced less as the positive identity of the protests and more as an imposition – as something suffered, rather than proudly expressed. Similar to the insurrections across North Africa or the various squares occupations in Europe and North America that would follow, Thaksin could be invoked as a unifying figure for the encampment precisely because of its inability to cohere around anything else.

In other words, the overflowing diversity of demands and identities could no longer easily be subordinated to any supervening social agency – such as 'the people,' 'the peasantry' or simply 'the poor' – invented by civil society leaders to function as a coherent administrative category for negotiation with the government, as had been the case in the 1990s. It was instead something much more volatile: an event, in Badiou's terminology or, in more pragmatic terms, what Asef Bayat calls a 'non-movement,' defined as 'the collective action of dispersed and unorganised actors.'[129] Though the outlines of the protest were

128 Ibid.

129 Bayat, Asef 2013 'The Urban Subalterns and the Non-movements of the Arab Uprisings: An Interview with Asef Bayat', *Jadaliyya*. https://www.jadaliyya.com/Details/28301

organised by the UDD, the occupation itself was a political moment in which violent potentials emanated from a complex though largely proletarian rabble that could be channelled but not quite controlled. In a practical sense, 'democracy' became the unifying demand simply because the ruling government had toppled an elected one, with Abhisit placed in power by the shadowy force of unelected elites. But, in a deeper sense, the demand for democracy seemed a natural expression of this underlying disunity. It was not the voice of a coherent *demos*, forming something like a liberal pandemocratic camp as in Hong Kong, but instead as the clamour of a *pandemonium* roiling like a red sea risen in blind rage to drown the powers and principalities of hell itself.

We can therefore think of the non-movement as a conflictual collision of many subsistence struggles that, through their sheer mass and complex force of interaction, create the 'evental' potential for a certain rudimentary partisanship that is nonetheless not yet able to structure a coherent politics around itself. It is the class as seething mass riven by the first divides on which organisation might take root but stopped short of composing itself into a political subject with any enduring power. Non-movements are a more or less organic expression of the historical party, rich in tactics and poor in strategy. As the communist collective Endnotes argues: 'These non-movements are not in any sense revolutionary in themselves. They are closer to what Camatte has recently called "passive revolts": subjective expressions of the objective disorder of our times.'[130] They are therefore able to thrive through the perpetuation of obscure antagonisms and riotous acts against symbols of power.

Writ large, these may grow into insurrections and even trigger civil wars. But the elaboration of any more expansive form of partisan subjectivity tends to break apart as soon as it emerges. Stillborn, partisanship is thereby imprisoned in a pure potentiality by the very forces of history that have produced it. The absence of any organised communist force all but ensures that the only formal parties propelled by this historical momentum will be organisations of the established elite (the party of order) or even the reactionary forces of the far-right (the anti-party), both of which will ultimately turn around to crush the very uprising from which they drew their power (the party of anarchy). Though the non-movement of the red shirts was loosely unified around Thaksin, this very unity was therefore divisive. Similarly, every attempt to invoke the Thai 'people' or 'nation' mirrored identical appeals from the opposing camp, such that the spectre of civil war slowly came to haunt the traditional vocabulary of populism.

130 Endnotes 2020.

Protestors' own narratives of the encampment and their personal reasons for being there give some insight into this complexity. At the height of the occupation, anthropologist Claudio Sopranzetti interviewed participants and supporters, both at the occupation site in Bangkok and in rural Isan. One interview with a ruralite who travelled to the city to join in the protest helps to illustrate the basic tension at play:

> But life in Isan is better than it used to be twenty or thirty years ago, right? You have television, electricity' we ask. 'Yes we have a better life, we are richer, and we have things we didn't have in the past.' 'So life is easier now?' 'It is not, life is much more difficult now. When I was a kid life was easy. You just grew rice, caught fish, and you could live there. Now is different. You need to send your kids to school, save for chemicals to put in the field, have money for petrol. The whole world has developed, and so has Isan, but we are slower than Bangkok so we remain behind.'[131]

In other words, it was not an experience of abject poverty or absolute dispossession that drove the protests so much as a sense of the *relative* inequalities and exclusions that accompanied economic growth, alongside the more existential stress of being fully incorporated into the market economy via the development process itself. The most basic features of proletarian life – reliance on money to survive, the need to labour on the market to get that money, and the reconfiguration of the social metabolism with nature to accord with these imperatives – here appear as something like a foreign force that has colonised the simple life of subsistence. Though such a narrative is also an obvious myth, since it elides the entire history of postwar settlement in the very upland areas that would become the site of rural nostalgia, it nonetheless narrates a certain experience of class as the imposition of an inhuman form of social reproduction.

This sense of relative rather than absolute decline invoked by many of the protestors was also significant, since insurrectionary moments tend to emerge not among the populations who have simply suffered the worst oppression for the longest period of time but instead among those who have seen their rising expectations suddenly dashed.[132] Ironically, then, it was precisely the sequence of export boom, sharp crash, and promised-then-pilfered recovery that spurred many to join the protests. Similarly, the recurring theme of relative inequality in

131 Sopranzetti 2012, pp. 16–7.

132 This is known as the 'J curve' model of revolution, formalised in: Davies 1978.

the midst of more general development was often invoked to express both the geographic divide between the metropole and hinterland and a displaced sense of class. As Sopranzetti explains: 'Their requests, even if voiced under the word "democracy," when broken down and unpacked, revolve around what we would call a "social equality" agenda, much larger than a quest for a new political structure.'[133] And inequality itself was a multifaceted category, with legal, economic, and educational inequities mapped onto the underlying divides between north and south, city and countryside, or simply wealthy core neighbourhoods within Bangkok and its poorer suburban peripheries.

The encampment itself even reshaped the basic geography of urban space, which soon split into 'red areas' and 'yellow areas' only navigable through intimate knowledge of how an amorphous politics was playing out across the city's physical infrastructure, with booming real estate values marking out enemy territory or sites of attack: 'These days, all around the city, wrist bands and small flags are taken off or put on depending on the area, as a new geography, often overlapping with the geography of inequality, is reshaping dwellers' perceptions of their city …'[134] Meanwhile, the urban fabric itself became weaponised. Bullets bounced off concrete overpasses, protestors armed themselves with sharpened bamboo sticks, lengths of rebar, and whatever else was at hand: 'A man passes me carrying a table leg.'[135] Tires were stacked into barricades and burned. Battles played out on bridges. Narrow alleyways became crowded thoroughfares. Small shops became makeshift shelters. Only the motortaxi drivers could deploy their intimate knowledge of the city's day-to-day reproduction to thread this new urban fabric with any efficiency.

As in basically all mass demonstrations in the past, the protests had initially been located near the Democracy Monument and the 'historical boulevard for political protests' on Ratchadamnoen Avenue, which runs toward the Royal Throne Hall and the (since relocated) Parliament, with the headquarters of various government ministries on either side. From their central stage on Phan Fa Bridge, negotiations with government representatives would be televised and symbolic protest caravans would depart to weave through the city in rivers of red, growing larger as tributaries from working class neighbourhoods fed into the flow. But stale negotiations and protest parades soon gave way as 'the red shirts decided to change strategy and move part of their supporters to the upscale commercial centre of the city and quintessential space of inequality:

133 Sopranzetti 2012, p. 12.
134 Sopranzetti 2012, p. 76.
135 Sopranzetti 2012, p. 77.

Ratchaprasong intersection and its adjacent areas.'[136] The wealthy shopping district quickly became the new centre of the encampment, with a stage raised beneath the tracks of the skytrain. Sopranzetti describes a sea of red seething beneath the luxury malls, overseen by billboards emblazoned with the face of Thai movie stars and models decked out in Gucci, Louis Vuitton, and Versace. If anything, the symbolism was maybe too heavy-handed.

Aside from the symbolism, however, Ratchaprasong also served a practical function. Soon after the move, soldiers had attempted to clear the first encampment around Democracy Monument, resulting in 19 dead civilians. That night, a group of black-clad individuals armed with guns and explosives then launched a counterattack against the military, killing five soldiers. Afterwards 'men in black' would become foils in government propaganda and the focus of conspiracy theories about agent provocateurs, prefiguring identical narratives that would be promoted by centrists and conservatives in basically every major uprising in any given country over the subsequent decade – as in these later cases, it seems likely that the black-clad individuals were simply militant supporters of the protest, rather than government agents.[137] The move to Ratchaprasong was therefore part of a larger strategy designed to shield the protestors from increasingly intense military assaults. As a leftist book vendor who ran a stand at the protests explained: 'The owners of these shopping malls are the people behind this government and the aristocracy. They don't want the army to engage in any fight here. That will damage their property … We are safer here, protected by Louis Vuitton bags.'[138]

The new location therefore drove a wedge into the commercial heart of the city, with the atmosphere again foreboding that of similar occupations that would arise all over the world soon after:

> People sit on the ground and listen with a less physical participation, surrounded by spaces of commerce and consumption transformed into a truly social space, a new political arena in the city, away from the traditional politics played in the old town … The atmosphere is calm and joyful, food being cooked, the light dimming, and the usual clapping … At the same time a funeral is going on a few kilometers away at Phan Fa Bridge, where the people were killed last night …[139]

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136 Sopranzetti 2012, p. 25.

137 Prachathai 12 April 2017 '10 Facts about the 10 April Crackdown: 7 years of Unhealed Wounds', *Prachathai English*. https://prachataienglish.com/node/7069

138 Sopranzetti 2012, p. 51.

139 Sopranzetti 2012, pp. 28–9.

Such spaces are, by now, familiar to many. Sublime geographies of struggle open in the streets below the flows of finance, seeming to warp space and time around the fidelity of a new, intensive ethics.

But the event is also fleeting and precarious, and the thrashing of the historical party is often met with a state-backed strategy of escalating suppression. As in Hong Kong, the veil between worlds seems to grow thin. Sopranzetti recounts red-painted coffins laid out on tables, with long lines of people waiting to pay their respects to the growing population of martyrs. Hails of bullets and tear gas canisters are muted in the torrential rain of the tropics. One protestor 'is circling with a pen every bullet hole he can find on the walls,' as if this might somehow contain them, like the circles of glutinous rice said to ward off demons.[140] Others 'search in the rubbish on the side of the road for bullets, memorabilia of this moment.'[141] Meanwhile, blood dries brown in the tropical sun and 'people with tears in their eyes stare at the bloodstains, delimited by yellow metal barriers and adorned with two dirty red shirts, both with Thaksin's face on them, some flowers and food, rotten in the unbearable heat of the day, and some coins, offerings to the spirits.'[142] Hell money is paid to the growing regiments. 'On a big board across the street are pictures of the dead bodies, photographed and reproduced by dozens of cameras, cellphones, and camcorders that will bring them into the private lives of thousands, into their living rooms.'[143]

As the state's response grows more violent, the weight of the dead presses harder against the world of the living. Eventually something breaks. The shield of luxury offered by Ratchaprasong gives way and, after six days of heavy fighting, the military finally disperses the last protestors. Tanks push through the final barricades beneath the shopping malls. In response, militant holdouts salt the earth and soon 'buildings along Rama IV are burning: bank branches, convenience stores, and some ATM machines.' Aside from banks, the city's ubiquitous 7-Elevens, all owned by CP Group, have been targeted 'with surgical precision.' The front page of the local newspaper is emblazoned with the headline: 'FIERY ANARCHY.' By the end of the day, nearly all the city's largest shopping complexes have been set on fire. 'The scene is apocalyptic,' Sopranzetti says, staring at the burned-out husk of the 'Zen' section of the Central World mall. What remains of the encampment is nothing but abandoned chairs scattered

140 Sopranzetti 2012, p. 33.
141 Ibid.
142 Ibid.
143 Ibid.

in confusion, food rotting in the heat, 'a huge black plastic sheet protecting the stage from the sun and snipers swings with the breeze' and the stage itself is stripped down to its skeleton.[144]

9 Party Building

By the time of the 2010 occupation, the sigil of the red shirt had gained a social force that had clearly begun to exceed support for Thaksin and his affiliated political parties. Similarly, the UDD as a formal organisation had also incorporated pro-democracy activists with no particular affinity for Thaksin. Giles Ji Ungpakorn, a Thai socialist charged with *lèse masesté* and forced into exile for criticising the 2006 coup, describes the basic situation as one of 'parallel war,' where the formal UDD fought 'against the military-royalist elites, where thousands of ordinary red shirts struggled for democracy, dignity and social justice, while Thaksin and his political allies waged a very different campaign to regain the political influence that they had enjoyed before the 2006 coup d'etat.'[145] Many on the ground saw a similar divide. As explained by the leftist bookseller interviewed by Sopranzetti: '"You know, I don't like Thaksin either," he says, lowering his tone, voicing a position that is slowly spreading, "but now it is clear Thaksin was just a tool. This is not about him anymore."'[146] And, on another occasion, the same interviewee expresses an identical position with regard to the ruling Democrat Party and their military backers: 'This is class war, pure and simple, and the problem is not Abhisit but the people above him.'[147] As the intensity of the conflict grew, militant forms of defence continually pushed the encampment beyond its tactical boundaries, all while increasingly incisive forms of knowledge were developed on the ground through political debate, discussion, and the distribution of radical texts.

But, as Ji Ungpakorn stresses in his various post-mortems tracking the decline of the red shirts over the subsequent decade, the socialist wing of the movement was never able to cohere into an independent organisational force. By remaining subsumed under the formal leadership of the UDD, which threw its support behind the TRT successor party Pheu Thai, even the most militant of

144 Sopranzetti 2012, pp. 121–2; 130–1.

145 Ji Ungpakorn, Giles 9 September 2012 'Thailand's "parallel war": Thaksin and the Red Shirts', *Links: International Journal of Socialist Renewal*. https://links.org.au/thailands-parallel-war-thaksin-and-red-shirts

146 Sopranzetti 2012, p. 51.

147 Sopranzetti 2012, p. 27.

the red shirts were ultimately forced into a series of losing battles. Nor was this outcome particularly difficult to predict. Tactical dead-ends of this sort litter the labyrinth of populist struggles, expressing in a lesser form the basic conundrums faced by any peripheral political conflicts unified by a lowest common denominator anti-imperialism or nation-building project. Dependency theorist Samir Amin offers the prototypical description. For Amin, struggles within the peripheral countries are quickly riven by conflicts over the basic course taken by 'the political anti-imperialist fronts' driving them. Soon enough, this becomes an essentially polar division,

> between, on the one hand, the established class powers who 'naturally' aspire to flourish in the form of national bourgeoisies forcing acceptance of their equal participation in shaping the future of the world and, on the other, the complex and alternative historical blocs centred, to diverse degrees, on the popular classes in the diversity of their expressions.[148]

When the bourgeoisie are successful in this struggle, their victory is then expressed 'in making imperialism accept new forms of the international division of labour.'[149] The difference between the modernists and the monarchists was simply in the exact form that this division of labour would take.

Nonetheless, the very incoherence of non-movements is also a source of chaotic vitality. During the 2010 occupation, this overspilling of the populist program was evident in the visual language of the red shirts, which not only reproduced nationalist imagery and repeated politically safe anti-imperialist talking points but also began to articulate an increasingly overt anti-capitalism. Common books and pamphlets sold at the encampment included those 'about people's movements, an odd mixture of contemporary radical history … classics of Thai radicalism … and the basics of Marxist thought, from Marx himself to Rosa Luxemburg.'[150] The cover of one red shirt magazine sold throughout the city showed a famous painting of Lenin overlooking a sea of red flags as they surged forward, its contents drawing parallels between the Russian Revolution and the 2010 occupation – the interior even featuring an old photograph of King Chulalongkorn sitting with the Romanovs, to drive the point home – and, under Lenin, a quote: 'History will not forgive us if we do not assume power

148 Amin 2018, p. 121.
149 Amin 2018, p. 93.
150 Ibid.

now.'[151] More recent radical history also helped to set the visual tone of the encampment. Underneath a welcome sign, 'a larger square banner shows a fighter with open hands, in a typical Zapatista representation in stencil. A white inscription "Peasants" (translation of *phrai*, the Thai word for commoners) stands out in the sunset from the shirt of the speaker.'[152] Mao caps emblazoned with a single red star had also become common symbols among left-wing red shirts, who briefly sought to advance their own radical program via the socialist organisation Red Siam – and yet proved unable to invent any sort of new visual language to do so, instead relying on the remaining inertia of nostalgic symbols from socialism's heyday.

The Red Siam manifesto (authored by Ji Ungpakorn in exile) was similarly steeped in a certain hollow grandeur drawn from the past. The document advocated not only conventional calls for democracy and freedom of expression but also elements of the classic Trotskyist transitional program, such as raising taxes on the rich to fund a welfare state, modernisation of education, transport, housing, and energy infrastructure, vastly cutting the military budget, abolishing the influence of the army, reforming the judicial system to operate on public mandate rather than royal appointment, non-intervention of the crown in politics, and increasing citizens' direct participation in local government.[153] In part, the mobilisation of visual language drawn from radical history was due to the influence of older Maoists who had retired into rural organising and then been recruited into either the early TRT or the later UDD. But such materials enjoyed an obvious, broad appeal, creating a strange phenomenon in which classic communist emblems became some of the most popular symbols of a movement that brought together old guerillas and former recruits in anti-communist militias such as the 'village scouts,' thereby replicating at the mass level the curious alliance that had earlier been forged within the TRT between former Communist Party members and the officers who had been tasked with exterminating them.

The overspilling of popular power was also visible in the rapid growth of the UDD itself, with membership surging exactly when the protests increased in scale and intensity. Rather than scaring away prospective members, the stubborn persistence of the encampment and the violence deployed against it only saw more drawn in, with those who had supported the cause in silence

151 Farrelly, Nicholas 26 March 2010 'History will not forgive us …', *New Mandala*. https://www.newmandala.org/history-will-not-forgive-us/

152 Sopranzetti 2012, p. 28.

153 Ji Ungpakorn, Giles 2009 '"Red Siam" Manifesto'. https://thaipoliticalprisoners.files.wordpress.com/2009/02/red-siam2.pdf

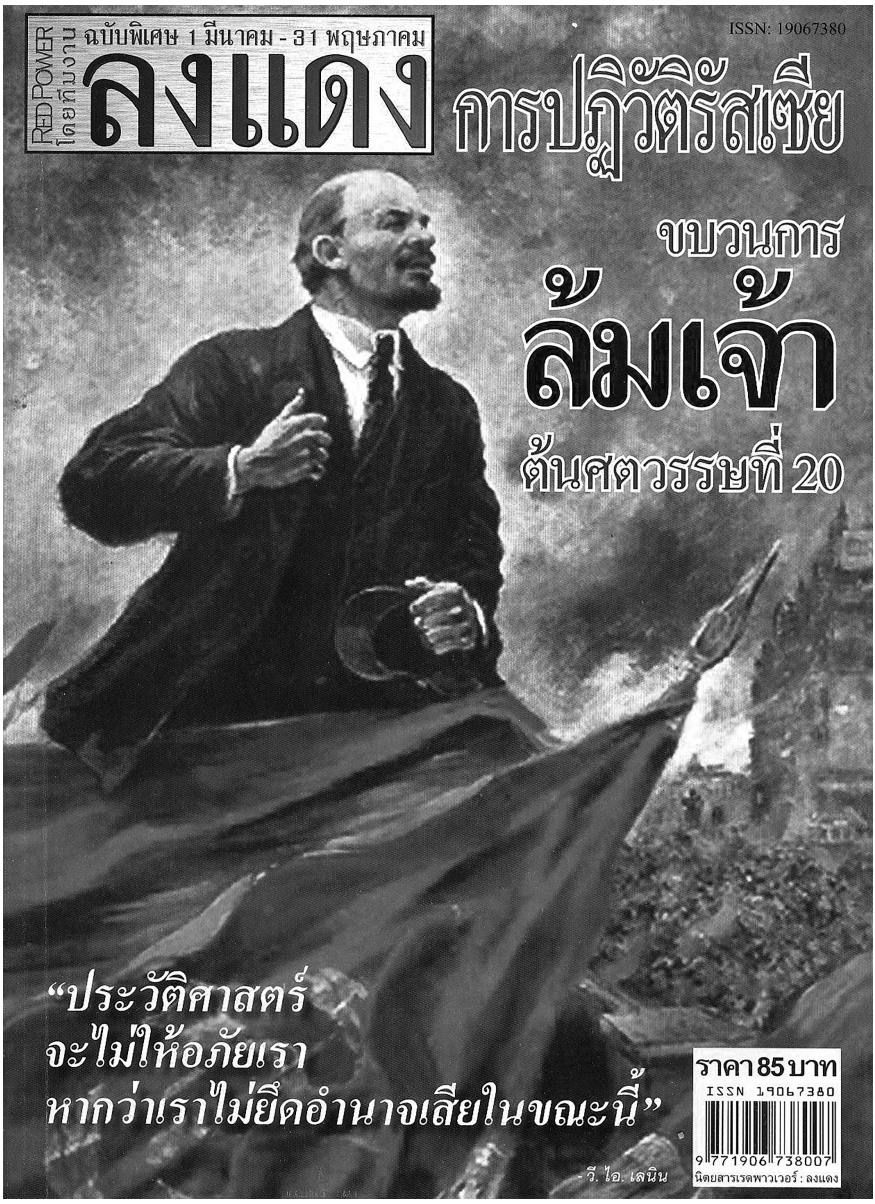

PHOTO 11 The cover of a magazine distributed at the encampment
NEW MANDALA

finally coming out in person and others who had been present but never formally joined the UDD deciding, at last, to sign a membership card. After one deadly military attack, Sopranzetti describes a particularly telling scene: flower-covered coffins line one side of the Democracy Monument, each of which 'bears a picture of the body inside and a copy of his or her national ID.' On the other side, however, a different congregation gathers: 'interminable lines of silent people [wait] to be photographed and receive a red-shirt membership card.' The implication depends which direction one reads the scene: as life descending into death or death rising out of itself, blood reborn in brighter red. In either case, it is an enduring image of the link between partisanship and organisation.

The UDD was able to build power as a formal party by operating effectively within the field of competitive control opened by the uprising, all while maintaining fidelity to the unpredictable upsurge of the historical party – at least initially. But the very dominance of the UDD within the leadership of the red shirts and its continued links to the coterie of elite interests that had congealed around the Shinawatra family would ultimately lead to a series of backsteps and betrayals that foreclosed more radical prospects. The UDD, then, illustrates two major limits confronted by the forces of organisation that arise from the momentum of the historical party: first, it demonstrates the tendency for all formal parties to ossify in the long, dark night between the uprisings that birth them; and, second, it shows both the enduring temptation and the strategic error of alliances with elite interests prior to the construction of any independent base of power – including (perhaps especially) joining well-intentioned popular fronts with subaltern elites leading developmental drives in their struggle against the established firms at the top of the imperial hierarchy.

But the UDD also demonstrates how organisation can compose itself through the motion of the historical party and how, by retaining fidelity to the historical party, formal parties are able to draw up and intensify further surges of mass activity. The UDD initially emerged as nothing more than a loose federation linking together a wide range of groups who opposed the 2006 coup. In much the same way that the Asian Financial Crisis had enabled the TRT to unite a diverse group of otherwise opposed populist forces under its banner, the coup against the TRT provided common cause for both pro- and anti-Thaksin forces who were nonetheless united against what they called the 'aristocratic polity' (*Ammatayathipatai*). Prior to taking on any formal status, it was only practical opposition to the military government and its overlap with the monarchy – epitomised by the figure of Prem as president of the privy council – that slowly composed the various forces organising protests into a coherent party.

As is often the case, the origins of the formal party were purely functional. The organisation that would become the UDD began as an effort to establish a cable channel (PTV) designed to counter the influence of the pro-military ASTV in the midst of periodic radio blackouts in the regions that had seen the strongest electoral support for the TRT. The effort was led by 'Veera Musikapong, a former democrat and engaging orator who had become a fierce supporter of Thaksin; Jakrapob Penkair, a broadcaster hand-picked by Thaksin as a government spokesman; and Jatuporn Prompan, another former TRT spokesman.'[154] But the government communications agency refused to cooperate and the group instead adopted the very method that Sondhi himself had used in founding PAD, turning to street rallies organised around live oration from a main stage, often recorded or broadcast to crowds nationwide via the internet.

Over the subsequent year, these rallies grew in size, drawing other pro-democracy activist groups around their orbit. In the summer of 2007, the PTV group then announced that they were uniting with these various activist groups to form the UDD. This broadened the base beyond the staunchly pro-Thaksin PTV core to include figures such as Weng Tojirakarn and Thida Thavornseth, both former student activists who had participated in university protests in the 1970s and then fled to the jungle to fight with the communists.[155] Both had also been highly critical of Thaksin, with Weng protesting alongside Chamlong and Sondhi in the early 2000s, before splitting with them because of their royalist leanings.[156] Links to the former TRT remained strong, however. After the TRT replacement party won the 2007 elections, the newly elected government aired a PTV-style program called *Truth Today* on the state cable channel, where the presenters introduced the red shirt as the uniform of the UDD. Competing with yellow shirt broadcasts, *Truth Today* and various red shirt community radio stations remained popular in the northern heartland and among the urban poor.[157]

These media battles rapidly expanded the ideological scope of the movement, with red shirt broadcasts offering detailed histories of the rise of Fascism in Europe as an allegory for the rise of the PAD, to which yellow shirt

154 Phongpaichit and Baker 2009, p. 291.

155 Reuters 3 December 2010 'INTERVIEW – Thai activist leader wants "red shirts" revamp', *Reuters*. https://news.trust.org/item/20101203111500-0j7to

156 The Nation 28 December 2008 'Operating to save Thai democracy', *The Nation*. https://web.archive.org/web/20090308120500/https://www.nationmultimedia.com/2008/12/28/opinion/opinion_30091997.php

157 Phongpaichit and Baker 2009, pp. 337–9.

leaders were compelled to respond. This soon evolved into a more general debate where 'the main issue was less about Thaksin as a political figure, and more about fundamental issues of how democracy should work.'[158] Meanwhile, street protests ramped up again once the brief-lived government was dissolved by the courts and Abhisit placed into power. The UDD played a central role in this process, organising rallies of increasing size and scale that culminated in the 'Bloody Songkran' uprising of 2009 centred on the government headquarters in Bangkok and the ASEAN meeting in Pattaya, with protestors successfully 'forcing Thai and foreign state officials to flee.'[159] After the military moved in to clear the protests, 'many observers thought that was the end of the UDD.'[160] But it turned out to be just the beginning. The failed Songkran uprising both increased popular support for the organisation and prompted it to refine its own organisational structure.

In the months that followed that first military crackdown in 2009, 'the UDD was completely reorganised by rebuilding its local branches, extending its presence in rural Thailand, and training its members.' Key to this effort were hundreds of 'Red Shirt Schools' that were 'opened all around the country to develop and foster the UDD local chapters and popular outreach.'[161] Former communists such as Weng and Thida were essential to such efforts, bringing with them decades of experience in rural organising. The effort also saw a series of rallies held in lower-tier cities across the countryside, with protests in early 2010 in Isan 'drawing thousands of people, yet almost completely unreported in national and international news.'[162] These rallies then evolved into the massive march on Bangkok later in the year which culminated in the red shirt occupation. The sequence therefore demonstrates how an initial, informal partisanship (being opposed to the 2006 coup) evolved through sporadic protests and functional needs to compose an increasingly formal party that, organising in fidelity to the potentials opened by these events, was ultimately able to trigger a series of escalating uprisings that culminated in an open confrontation with the military and the fiery destruction of Bangkok's central shopping district. It was only at this point that the UDD seemed to be truly defeated, with their leaders placed into prison, their supporters bused out of the city, and the unelected Abhisit government retaining its hold on power.

158 Ibid.
159 Sopranzetti 2012, p. 24.
160 Ibid.
161 Ibid.
162 Ibid.

In retrospect, however, this defeat was not so decisive. There was no necessary reason that the crackdown in 2010 could not have intensified organisational efforts in much the same way as the crackdown in 2009. Though many of the leaders were in jail, others were set to replace them, with Thida taking over as chairperson of the UDD in December of that year. Meanwhile, even though the subsequent months of martial law muted overt political expression, tens of thousands of card-carrying red shirts were now distributed throughout the country, with even more supporters. Instead, it was only in the aftermath of the 2010 crackdown that a deeper failure became evident, signalling both the ossification of the UDD as a formal organisation and its effective capitulation to the elite interests behind Pheu Thai, both made visible by the refusal to call on this mass base to further escalate the conflict. This decision effectively reduce the organisation to a mere petitioning body operating in conversation with the state.

Strangely, the strategic direction was apparently set not by the pro-Thaksin faction, but by leaders such as Thida and Weng, whose firsthand experience of a defeated guerrilla war had converted them to a stringent belief in the power of non-violence. Upon assuming leadership of the UDD, Thida promised to reign in the fracturing movement to prevent the emergence of armed and militant wings, committing instead to pursue 'a protracted but peaceful democratic struggle' that emphasised community organisation and the ongoing educational efforts of the red shirt schools.[163] Meanwhile, to appease popular anger, the Abhisit government agreed to go ahead with the 2011 elections as planned. But this also meant that the protracted and peaceful struggle would prove to be less about community organising as such and more about community mobilisation under the banner of Pheu Thai, which put forward Thaksin's sister Yingluck as its presidential candidate.[164] Yingluck's subsequent victory then marked the *de facto* death of the UDD as a formal party operating in fidelity to the spirit of the uprising.

163 Reuters 2010.

164 But betrayals by individual leaders or turncoat supporters rarely offer an adequate account of political defeat. The betrayal narrative – probably the most popular theme in leftist post-mortems of failed uprisings – ultimately tends to infantilise the bulk of participants, treating them as little more than naïve followers easily tricked due to their own blind adherence to those claiming leadership within any given uprising. If we instead accept that rank-and-file participants have their own agency, the question instead becomes: why did thousands of militant red shirts so readily capitulate to the decision to back Pheu Thai and retreat back into the confines of civil society organizing? On the one hand, the fatigue of a long battle will always encourage a period of retreat and recuperation. Any

10 Party Breaking

Thaksin had himself called for a 'people's revolution.' But when that revolution seemed imminent, the coterie of elites around the new TRT replacement party Pheu Thai would ultimately capitulate to conservative demands, leaving many red shirts in prison, muting criticisms of the military, and pursuing only moderate charges against the politicians who had ordered the crackdown in 2010. In all likelihood, these were pragmatic compromises negotiated, at least in part, through informal channels behind the scenes. The outcome of the election was all but guaranteed. The yellow shirts were again unable to gain much mass support outside their middle class and southern strongholds, giving Pheu Thai a clean majority and a clear popular mandate. After some coalition building within parliament, Yingluck ascended to the presidency in August of 2011. Those who hoped that a Pheu Thai administration would revive or even expand the more radical aspects of the old TRT platform were soon sorely disappointed, however. Harried by the royalists and unable to cohere the same broad base of elite support that Thaksin had enjoyed in the wake of the Asian Financial Crisis, the new government set out on precarious footing.

Meanwhile, the stable, if muted, recovery experienced under Thaksin had already succeeded in restoring the wealth of major Thai capitalists to their pre-crisis levels. For example, Charoen Sirivadhanabhakdi, who owns the country's largest beer company and had formerly been close to Thaksin, was able to build up a massive real estate empire in the early 2000s that, by the mid-2010s, had made his holding company the largest landowner in the country. Charoen then went on to lead a series of international acquisitions in and through the capital

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uprising that fails to seize resources and engage in widening decommodification – rendering private property into fuel for the partisan project – will ultimately hit a certain livelihood threshold wherein larger and larger shares of participants will be forced to return to their everyday life of work and wages in order to survive. On the other hand, the very 'confusion of identities' that serves as the condition of possibility of revolt today also stunts the composition of a coherent political subjectivity, predisposing even near-insurrectionary uprisings toward a lowest-common-denominator populism that sees victory in the mere changing of the guard, as new figures ascend to the helm of the same old state overseeing the same old status quo. Nor is this something that can be rectified through better education or more effective propaganda alone, requiring instead the same long and bloody road of learning through defeat that produced the communist parties of the past. Ultimately, the defeat of the red shirts can be understood as something like the strangling of an infant insurrection by its own umbilical cord – the 'people's revolution' suppressing the social war necessary for actual revolutionary change to take place.

market in Singapore.[165] Similarly, Dhanin Chearavanont's fortune recovered in part due to CP Group's increasingly lucrative investments in China. Ironically, the recovery of domestic growth and simultaneous expansion into the growing Chinese market then decreased Thai elites' reliance on Thaksin and his political machinery, allowing big business to thrive regardless of who was in power. After all, it was only the culling of overleveraged capital in the aftermath of the 1997 crisis that had aligned these elites under Thaksin's banner in the first place, muting the power of those who opposed him.

By comparison, the impact of the Great Recession was relatively mild in Southeast Asia. If anything, the close links with China enjoyed by many of the major Thai conglomerates allowed them to expand their wealth by buying into ventures buoyed by the Chinese stimulus and ensuing infrastructural boom. By the time that Yingluck took power, then, the upper rungs of the social order had again diversified, with many conflicting interests pulling in divergent directions. Maybe more importantly, the ongoing internationalisation of the major Thai conglomerates meant that they now had less to gain from the domestic market and did not necessarily benefit from the greater socialisation of the Thai labour pool, even if they had an interest in upskilling certain portions of the workforce, especially in and around Bangkok.

As for the lower class that had given Pheu Thai its popular mandate, the events of 2010 seemed to have frightened the Shinawatras and even many of the red shirt leaders away from stoking populist animus any further. The popular momentum taken on by the red shirts had also unveiled a more concrete contradiction between proletarian interests and those of the capitalists bankrolling the movement, even if both were articulated through the same language of development. Ultimately, increasing taxes on the rich to fund rising social reproduction expenditures remained unpalatable to the party leadership. Thus, even while the Pheu Thai platform in 2011 promised to eliminate poverty by 2020 and raise the (rarely enforced) minimum wage, it also proposed drastic reductions in the corporate income tax and doubled down on the old TRT practice of stimulating rural marketisation by increasing credit for farmers.[166] In a major disappointment to many, Yingluck's first cabinet also included no red shirt activists – though several, including Weng, were elected to parliament. Meanwhile, over 200 red shirt prisoners remained in jail. The

165 Grant, Jeremy 26 August 2014 'Thai tycoon Charoen Sirivadhanabhakdi back on acquisition trail', *Financial Times*. https://www.ft.com/content/3e95f9f8-2d8f-11e4-aca0-00144feabdc0

166 Leeahtam, Pisit 9 January 2012 'Thailand in 2011: a year of surprises', *East Asia Forum*. https://www.eastasiaforum.org/2012/01/09/thailand-in-2011-a-year-of-surprises/

theme of her administration was instead peace and reconciliation, with the king publicly endorsing her cabinet and Yingluck's moderate policies offering an olive branch to potential opponents.[167] A year later, swelling dissatisfaction eventually led Yingluck to add a single red shirt figure (Nattawut Saikua) to her cabinet.[168] But by then it was too late.

Ironically, by leading the Thermidorean reaction from within the ruins of the red shirts, Yingluck's administration would pave the way to its own overthrow by the very generals it had refused to depose. Not only did the UDD degenerate into an ossified shell of itself, but its failure to retain fidelity to the event had also helped to consolidate an internal party of order, in the form of Yingluck and Pheu Thai, posed against the threat of anarchy emanating from the historical party and its red-shirted rabble. This meant that the only functional organs of institutional memory carrying on the history of struggle were either the anodyne and increasingly centre-right administration of Pheu Thai itself or the far-right inheritors of the yellow shirts' royalist utopianism. As a result, after a few years of lacklustre growth, demonstrations against the Yingluck government again began to cohere around the right-wing Pitak Siam ('Protect Thailand') organisation in 2012.

Pitak Siam relied on Santi Asoke's Dharma Army (led by Chamlong) and successfully drew back disaffected former supporters of the yellow shirts, including both vaguely progressive civil society organisations such as (certain sections of) the Assembly of the Poor as well as openly ultra-nationalist factions such as the Thai Patriots Network. But Pitak Siam was ultimately unable to muster sufficient support in the streets on its own.[169] Soon, the organisation was quietly retired and replaced by the People's Democratic Reform Committee (PDRC) or, in full, the 'People's Committee for Absolute Democracy with the King as Head of State.' The PDRC was able to draw together many of the 2006 coup's original supporters alongside a broad coalition of newer voices opposed to the government, mobilising protests under a fresh banner that doubled down on populist posturing for the global audience. Though it

167 Though charges were pursued against certain figures such as Abhisit, they remained confined to conventional criminal courts and Yingluck continued to offer a net amnesty for both yellow shirts and red shirts, which critics alleged was a cover to bring Thaksin back from exile (Our Correspondent 10 August 2011 'Thailand's New Yingluck Cabinet', *Asia Sentinel*. https://www.asiasentinel.com/p/thailands-new-yingluck-cabinet)

168 Ehrlich, Richard S. 20 January 2021 'Thailand's UDD Leader Elevated to Cabinet,' *Asia Sentinel*. https://www.asiasentinel.com/p/thailands-udd-leader-elevated-to-cabinet

169 Sinpeng, Aim 26 November 2017 'Pitak Siam's failure', *New Mandala*. https://www.newmandala.org/pitak-siams-failure/

effectively absorbed the PAD, it did not adopt the yellow shirt as its symbol. Instead, yellow was replaced with now-omnipresent Thai flags, mimicking populist practice elsewhere.

The PDRC was thereby able to serve as a big tent coalition encompassing a broader, more pluralist populism than that of the PAD.[170] The organisation would include not only the remnants of PAD and other established far-right forces such as the Dharma Army, but also new organisations of professionals, including doctors and nurses, as well as student groups, such as the Network of Students and Citizens for Reforms, which helped the group rebrand around then-fashionable symbols from protest movements elsewhere in the world, such as the Guy Fawkes mask. The PDRC also inherited the PAD's crucial base of support among workers at state-owned enterprises. While there was no attempt to hide the fact that the movement was helmed by figures from the establishment – specifically an array of Democrat Party politicians led by Suthep Thaugsuban, who had served as Deputy Prime Minister under Abhisit and was personally in charge of administering the crackdown on the 2010 protests – these were leaders who, in response to their electoral defeat in 2011, sought to organise a legitimately grassroots campaign to build electoral support for the Democrats modelled on that of the UDD alliance with Pheu Thai.

They began mobilising public broadcasts and street gatherings to build out a base of popular support, proving much more successful than Pitak Siam's earlier attempts to do the same thing. This allowed Suthep and allied politicians to enforce a loose unity on the PDRC, despite many of the more radical of the former yellow shirt member organisations having adopted the sort of blanket 'anti-politician' stance common in populist campaigns against corruption and 'crony capitalism' elsewhere.[171] In other words, the attempt to mimic the red shirt strategy was somewhat successful, even if it fell short of providing an electoral majority: practical opposition to Yingluck played much the same role in uniting the PDRC as opposition to the 2006 coup had in cohering the UDD.

But, whereas the UDD ultimately degenerated, abandoning its partisan fidelity in the name of constructing and upholding an emergent party of order in the figure of Yingluck's Pheu Thai, the PDRC represented something more like

170 For an overview of the political positions held by various participants, see: McCargo and Thabchumpon 2021.

171 Sinpeng, Aim, 30 November 2013 'Who's who in Thailand's anti-government forces?' *New Mandala*. https://www.newmandala.org/whos-who-in-the-anti-government-forces-in-thailand/

an anti-party: an organised social force designed to suppress the momentum of history in the name of returning to a mythic, salvific order rooted in tradition and symbolised by the crown, which was imagined to be the last ethically pure political institution. Thus, the 'reform' that they called for was the nullification of the elected government and its replacement by a 'People's Council,' selected in part through appointment and in part through election via professional constituencies. This council would be empowered to act as both a legislative and judicial body and its central function was ostensibly the elimination of 'corruption' and the 'eradication' of the influence of the Shinawatra family and those close to them – with the 'Thaksin regime' serving as foil for the PDRC in much the same fashion as the 'aristocratic polity' had for the UDD.[172]

In a strange way, however, their opposition to mass politics and fondness for utopian fantasies allowed the most radical of the PDRC protestors to embrace an even more openly anti-political stance than that of the red shirts. Regardless of their explicit endorsement of the monarchy and tacit support for the military, the belief in a harmonious society of close-knit rural communes advocated by national anarchist groups like Santi Asoke seemed to gesture toward a far more substantial social transformation than that advocated by even the most radical red shirt manifestos, which ultimately remained committed to conventional themes of development and democracy. But, upon closer scrutiny, the situation reverses. The agrarian myth of the royalists was not simply an incidental product of the degradation of productive subjectivity but was instead the active embrace of this degradation, forcibly rejecting questions of productive power and thereby foreclosing the possibility that a communist political subject might be composed through social conflict.

Meanwhile, despite its apparent emphasis on the reproductive rhythms of rural life, this utopianism also had the effect of obscuring the struggles within the reproductive sphere that had formed the practical basis of the red shirt program. The dire conditions of healthcare and education in the countryside were pasted over with a mythic vision of community. The urban precariat, employed in a wide range of reproductive services, were portrayed as a teeming underclass driving urban decay and immorality – an image that was reinforced by the fact that sex work capitals such as Pattaya were also red shirt strongholds. As the anti-party, the PDRC was essentially opposed to the formation of any mass subject whatsoever, calling for an external force above politics (the monarchy and/or military) to reach down and nullify the turbulent motion of history in

172 Assembly for the Defence of Democracy 11 December 2013 'Statement of the Assembly for the Defence of Democracy', *New Mandala*. https://www.newmandala.org/assembly-for-the-defence-of-democracy/

the name of an ahistoric national essence. In contrast, the red shirts' focus on questions of development and equity at least indirectly raised questions of productive and, especially, reproductive power, albeit ones often filtered through the given terms of educational access and wage rates. Though their ambivalence toward elite-led development projects certainly contributed to their defeat, developmentalism also served as the default language through which they were able to articulate the realities of social domination, the degradation of productive subjectivity, and the more general crisis of reproduction affecting the country.

Over the course of late 2013 and early 2014, intensifying conflicts between growing PDRC protests and counterdemonstrations by the remnants of the red shirts led Yingluck to dissolve parliament and call for new elections. Unable to win at the polls, the PDRC led efforts to instead disrupt voting on election day, forcing the Constitutional Court to nullify the results. Without a government in place, the Court then removed Yingluck's administration from power on a technicality. Shortly thereafter, Army Commander and close associate of Suthep, General Prayuth Chan-Ocha, led the military in a coup. Martial law was imposed, and the constitution was suspended indefinitely. Later, it was revealed that Suthep and Prayuth had begun planning the coup as early as 2010.[173] Once in power, Prayuth initially committed to the basic PDRC program, promising to design a corruption-free system where all elected candidates must be of good moral quality.

But the military government was less forgiving in its attack on politicians, targeting those affiliated with Pheu Thai and the PDRC alike.[174] Shortly after seizing power, Prayuth's junta detained Suthep alongside other leaders of the Democrat Party, as well as Yingluck, her cabinet, and the Pheu Thai leadership. Yingluck herself was charged with abuse of power and negligence, and investigated by the anti-graft committee for her role in formulating a rice subsidy scheme (she was found guilty in 2016 in absentia, having already fled the country, just as Thaksin had before her). In the name of public order, the junta that had effectively been placed into power by PDRC agitation then pursued charges against many within the PDRC itself. Suthep was charged with insurrection, released on bail, and retired into the monkhood. In 2021, he would be found guilty alongside several other PDRC leaders, receiving a sentence of five

173 Campbell, Charlie 23 June 2014 'A Yellow Shirt Leader Says the Thai Coup was Planned in 2010', *Time*. https://time.com/2910484/thai-coup-planned-2010-suthep-thaugsuban/

174 Tonsakulrungruang, Khemthong 25 May 2014 'Thailand, what next?' *New Mandala*. https://www.newmandala.org/thailand-what-next/

years in prison.[175] As a result, the PDRC was effectively stripped of any capacity to organise as an independent force and reduced to serving the role of a think tank or public-relations NGO.

11 Neither Red Nor Yellow

The junta would ultimately prove to be the longest lived of any administration since the 1980s. Military figures were placed in charge of government ministries, recruiting established technocrats to make up for their lack of experience. The system that took shape was therefore something similar to the postwar military bureaucracy, but now with far less vigour. The power of the old elite had long been eroded, the rents they subsisted off had become dependent on fundamentally global flows of value, and massive military subsidies from the US were a thing of the past. Major capitalists were therefore easily able to accommodate themselves to the new regime. Large-scale infrastructure projects that had been pursued by previous governments such as the high-speed rail link with China went forward largely as planned. Despite anti-imperialist rhetoric, there was no attempt to pursue a true 'sufficiency economy,' nor were there even efforts to impose stronger tariffs or more stringent capital controls. At the same time, however, the military government also did not seem especially interested in promoting the country as a site for new foreign investment or in constructing their own developmental mechanisms. Overall growth therefore remained relatively slow, though of course military spending continued the increasing trend seen since the Thaksin era, with anti-terrorism, cross-border smuggling, illegal immigration – and, increasingly, threats of conflict with Cambodia – serving as the justification for the growing budget.[176]

Meanwhile, the profits of the major Thai conglomerates also became less and less reliant on increasing the productivity of the domestic workforce. By the early 2020s, aside from the state-owned energy company PTT Public and its petrochemical subsidiary, most of the largest Thai firms were located in the banking, retail, food production, and telecommunications sectors. Many drew substantial portions of their revenue from investments overseas. The country's

175 Bangkok Post 24 February 2021 'PDRC Leaders jailed for terrorism, insurrection over street rallies', *Bangkok Post*. https://www.bangkokpost.com/thailand/politics/2073863/pdrc-leaders-jailed-for-terrorism-insurrection-over-street-rallies

176 Blakley, Simon 6 May 2021 'The Economic Foundations and Consequences of Thailand's Military Junta', *Atlas Institute for International Affairs*. https://www.internationalaffairshouse.org/the-economic-foundations-and-consequences-of-thailands-military-junta/

largest industrial company is Siam Cement, of which the monarchy is the major shareholder. A significant portion of the population therefore subsists within the vast and largely informal service sector, where productivity growth is slow, wages are stagnant, and work itself often seasonal or infrequent. While there were some ongoing efforts to formalise and tax these activities in the style of the first TRT administration, as much as half of GDP and half of all employment were still attributed to the informal economy in 2020.[177]

In these same years, the steady decline in poverty seen since the Asian Financial Crisis also paused. From its peak of 42.3 percent of the population in the year 2000, poverty had been halved to around 20 percent shortly after Thaksin's second term was cut short in 2006. The poverty rate then continued its decline throughout both the Abhisit and Yingluck administrations such that, by the time of the 2014 coup, the figure had been halved again to around 10 percent. At this point, however, progress in poverty reduction essentially flatlined. From a low of 7.2 percent in 2015, the rate increased to 9.9 percent in 2018 before declining back down to a plateau between 6 and 7 percent in the years thereafter.[178] Employment growth was negative in all but one of the years between 2014 and 2019, and even official unemployment measures (a vast underestimate, given the size of the informal economy) began a slow increase from their all-time low in 2013.[179]

Even more damningly, this relative stagnation was occurring despite structural conditions slowly shifting back in Thailand's favour. Riding the commodities supercycle, the prices of major agricultural exports such as rice were almost double what they had been during the Thaksin years. In China, industrial firms facing saturated markets and narrowing profits due to rising costs had also begun to increase their overseas investment. The largest sums were involved in expensive mergers and acquisitions within the high-income countries (Figure 24). But, outside this backflow of capital now pouring into the wealthy

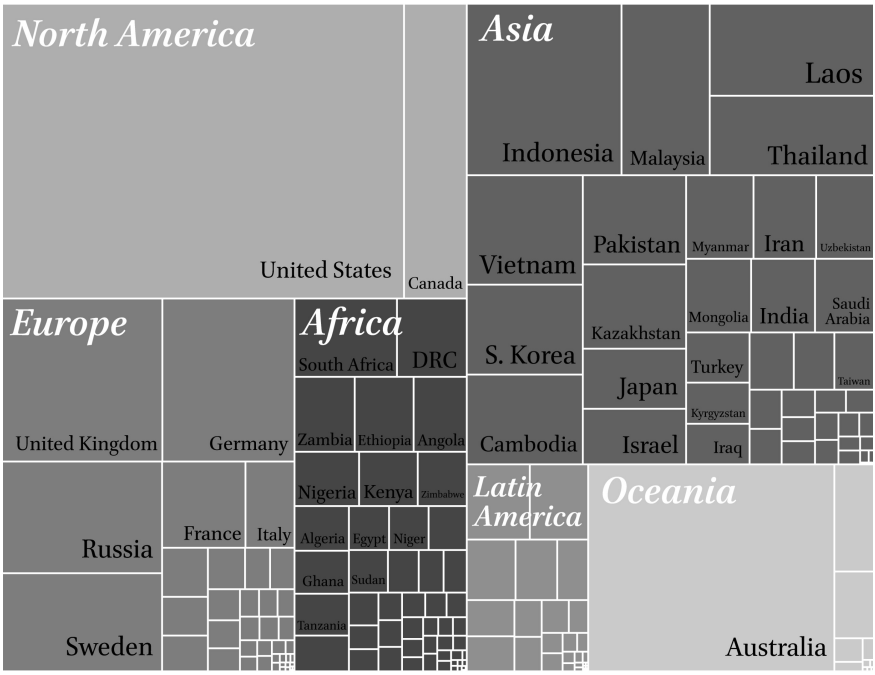
177 Banchongduang, Somruedi 20 February 2024 'Call for better integration of the informal economy', *Bangkok Post*. https://www.bangkokpost.com/business/general/2745121/call-for-better-integration-of-the-informal-economy

178 According to national poverty lines, as measured by World Bank indicator SI.POV.NAHC; a more detailed summary of poverty trends in the country can also be found in: Yang, Judy, Wang Shiyao and Reno Dewina 2020 'Taking the Pulse of Poverty and Inequality in Thailand', *World Bank*. https://documents.worldbank.org/en/publication/documents-reports/documentdetail/614661586924075867/taking-the-pulse-of-poverty-and-inequality-in-thailand

179 World Bank Group 22 June 2021 'Aging and The Labour Market in Thailand', *World Bank*, p. 3. https://www.worldbank.org/en/country/thailand/publication/aging-and-the-labor-market-in-thailand

China Outward FDI Stock

2020, Excluding Tax-Havens



Source: MOFCOM

FIGURE 24 China outward FDI stock (excluding tax havens), 2020

countries, the bulk of remaining Chinese outbound FDI stock was concentrated in Asia, and the vast majority of this in Southeast Asia (Figure 25).[180] Meanwhile, lead firms from the US, Japan, South Korea, and Taiwan began to diversify their own supply chains, shifting away from exclusive reliance on China for many of the same reasons – a trend that was then accelerated by the pandemic in 2020 and the Biden administration's decision to double-down on trade and investment policies designed to slow Chinese momentum in key sectors such as semiconductors. Given the inertia of established industrial territories, however, proximity to China was still a major advantage. Adding a further competitive edge was the fact that most of the countries in Southeast Asia had retained their

180 Both Figures 24 and 25 subtract Hong Kong and various tax havens from the data to get a more accurate picture of the final destination of outbound investment.

FIGURE 25 China outward FDI stock (excluding high-income)

demographic dividend. But, as in China, the population pyramid was slowly inverting. In Thailand, the relative share of the working-age population peaked in 2010, with the junta government overseeing one of the last decades in which the country would enjoy a clear, albeit receding, demographic advantage. By the time the junta allowed open elections to take place in 2023, Thailand had become one of the fastest-ageing countries in Asia.[181]

Faced with constrained domestic growth, major Thai conglomerates secured ongoing profitability mostly through foreign expansion. Thailand therefore attracted few of the industries that were relocating out of China – outcompeted both by cheaper sources of labour in Vietnam and Indonesia and more accom-

181 The share of the population 65 and older is projected to nearly triple between 2020 and 2060, rising from 13 percent to somewhere around 35 percent, and the working-age population projected to decline from 71 percent of the population to a mere 56 percent over the same years (World Bank Group 2021, p. 15).

modating governments in other higher-cost locations like Malaysia. Japan remained the country's largest source of FDI. Industry saw only middling growth under the junta and informality remained extremely high. In the overall economy, some 54 percent of all employment was informal, with construction (44 percent) and services (42 percent) seeing the highest shares outside of agriculture, where an estimated 91 percent of all employment was informal as of 2019 – particularly significant when considering that Thailand retained a relatively high share (30 percent) of population employed in agriculture for its income level. Meanwhile, an estimated 1.1 million Thais were estimated to be working overseas in that same year, with particularly large concentrations in Taiwan, Israel, Japan, and South Korea. Remittances rose as a share of total GDP from 2008 onward.[182] Inequality also soared, with the richest 1 percent of the population controlling 66.9 percent of the country's wealth and the top 10 percent controlling some 85.7 percent by 2018.[183] At the same time, however, the developmental programs of the Thaksin years had contributed to substantial improvements in public health and education, with the skill level of the labour force increasing and the share of workers with no education halved from more than 40 percent in 2001 to around 20 percent in 2019.[184] Combined with slow economic growth, this would then create the now-familiar phenomenon of an overeducated and underemployed population of young people thrown into common cause with gig workers and indebted ruralites.

At the elite level, these trends were reflected in the ascent of a new generation of young capitalists and liberal politician-intellectuals who again stressed the need to reform the military-monarchist bureaucracy and to stoke innovation within key sectors. While Pheu Thai survived the junta years – helmed by Thaksin's youngest daughter Paetongtarn Shinawatra in the 2023 election – this new generation of capitalists was wary of a party still so closely aligned with some of the country's largest business interests. Young elites therefore cohered first around the Future Forward Party and, after its dissolution, the Move Forward Party, which outpaced Pheu Thai in both its demands for reform

182 In 2021 and 2022, remittances composed 1.8 percent of Thai GDP. To place this in perspective, the figure was in line with that of Peru, which has a similar per capita GDP, was slightly lower than the ~2 percent for Mexico throughout the 2000s and 2010s (though the Mexican figure jumped sharply in the 2020s to around 4 percent), and remains well below the 9–12 percent seen in the Philippines, which remains among the largest single sources of international migrant labour. (According to World Bank indicator BX.TRF.PWKR.DT.GD.ZS.)

183 Credit Suisse Research 2018 'Global Wealth Databook 2018', *Credit Suisse*, p. 156, Table 6–5.

184 Credit Suisse Research 2018, p. 5.

of the political system and in its push for liberalisation. By the early 2020s, Pheu Thai, still adorned in a fading red, had come to represent an older generation of populist developmentalists who remained cautious in their approach to the military and monarchy. By contrast, Future Forward/Move Forward was emblazoned in bright orange and pursued an equally flagrant politics, calling for the repeal of the *lèse majesté* law, the rewriting of the constitution to roll back the changes made under the junta, substantial decreases in military and royal power, and also a number of measures popular with its younger voter base, such as the legalisation of same-sex marriage and the end of military conscription. Its 2023 platform was framed as one of 'demilitarization, demonopolization, and decentralization.' Similarly, borrowing a move from the populist playbook, it founded its own nonprofit, the Progressive Movement Foundation, which provided clean water, childcare, medical consultations, and other community organising services for the poor.[185]

Among its elite supporters, the party brought together a new generation of subordinate capitalists seeking to assert their interests against both the military-bureaucrats and established interests of big business. Support for free trade and opposition of unfair monopolies is therefore among its major economic themes. Future Forward was initially helmed by young Thanathorn Juangroongruangkit, heir to Thai Summit Group, the largest auto parts manufacturer in the country. After Future Forward's dissolution, the replacement Move Forward party would be led by Pita Limjaroenrat, heir to CEO Agrifood, a rice bran oil business, and former director of the Thai branch of Singaporean digital payments, ride-hailing and food delivery company Grab Holdings. Among the general public, the party's base of support also bears little trace of the old divisions between north and south, city and countryside, or metropolitan centres and peripheral suburbs. Move Forward's electoral performance in 2023 was particularly strong in urban centres, including within districts that had once been strongholds of either the Democrats (such as Phuket and central Bangkok) or Pheu Thai (such as Chiang Mai). But it also swept districts across the industrial Eastern Economic Corridor and captured a number of rural majorities in the Northeast, once a Pheu Thai stronghold. In a surprise upset, Move Forward was even catapulted ahead of its opposition ally Pheu Thai, winning the largest single share of seats (37.99 percent, compared to Pheu Thai's 28.84 percent, followed by Prayut Chan-o-cha's United Thai Nation party

185 Regalado, Francesca 16 May 2023 'How Move Forward shocked Thailand's old guard', *Nikkei Asia*. https://asia.nikkei.com/Politics/Thai-election/How-Move-Forward-shocked-Thailand-s-old-guard

with a mere 12.54 percent). This sudden success was at least in part due to the party's appeal among the 'lost generation' of young urbanites with higher levels of education who had come of age almost entirely under military rule. And this same generation will likely be the determining factor in mass politics over the coming decade, opening the potential for a renewal of partisan conflict on a new basis.

12 New Generations

Already in 2020–21, students and urban youth led a wave of protests against the military government which placed many once-marginal demands associated with the red shirts' most radical factions at the forefront of political discourse. Though these protests were triggered by the dissolution of Future Forward in the wake of its surprisingly strong performance in the 2019 election, the demands of protestors soon grew to include the end of military rule, the repeal of the junta's amendments to the 2017 constitution, and even unprecedented calls for an outright reduction of royal power. In contrast to the rudimentary populism of the red shirts, many protesters now expressed political positions that seemed to draw explicitly from the tradition of radical republicanism, often openly invoking figures such as Pridi Banomyong, who helped to depose the Thai king in the 1930s and end the absolute monarchy. In so doing, the new generation broke long-standing political taboos and risked severe legal repercussions.

In part, the increasingly bold republicanism of this new generation reflected the gradual erosion of Cold War cultural campaigns, which had constructed a unique form of social conservatism centred on the recently rehabilitated monarchy and undergirded by a romanticised view of the countryside as both a living example of harmonious agrarian community (albeit one under threat of communist incursion) and the autochthonous origin-point of the Thai nation. But anti-monarchist sentiment also tracked changes in the monarchy itself. For example, the death of the widely-liked King Bhumibol in 2016 and his replacement by the unpopular King Vajiralongkorn – notorious for spending most of his time not in Thailand but in his private castle in Bavaria – certainly helped to popularise more radical, anti-monarchist themes among the general populace. Similarly, the power of the monarchy had grown in troubling ways under the junta, with the budget of the Royal Office doubling between 2018 and 2020, two army units coming under the king's command, the assets of the Crown Property Bureau transferred to the king's personal ownership (rather than being ostensibly public), and Vajiralongkorn intervening into politics in a fashion that

was rare under his father's reign.[186] With an estimated wealth of somewhere between 30 and 70 billion USD, Vajiralongkorn is also the richest person in the country.[187] And, although much of this money is held in non-fungible public assets, a substantial portion is also invested in for-profit real estate ventures and two of the country's largest companies: Siam Cement Group and Siam Commercial Bank.[188]

The new wave of unrest also borrowed major symbols and practices from protests in places like France and Hong Kong, including a focus on moveable blockades, the use of umbrellas to defend against pepper spray, tactical principles such as 'be water,' and even the emergence of frontliners wearing goggles and hardhats. Protesters were thereby able to blockade large sections of Bangkok and even halted a royal motorcade – another action that had been essentially unthinkable only a decade prior. Initially, protests were largely confined to universities, with students amplifying their message via social media but then losing their momentum when the pandemic shut down campuses. By the summer of 2020, however, the protests resumed and gained a wider base of support. One demonstration in July of that year drew a few thousand people, making it the largest protest since the 2014 coup. Soon, gatherings were occurring across the country, growing in size into the fall. In Bangkok, the Democracy Monument again became a focal point, as did Ratchaprasong and the historic corridor leading along Ratchadamnoen road. The largest gathering was a September rally of tens of thousands on Sanam Luang, near Thammasat University and the Grand Palace, where demonstrators installed a plaque commemorating the People's Party that had abolished the absolute monarchy in the 1930s.

Despite their size and the radical nature of their demands, however, these protests remained tactically restrained and organisationally naïve compared to the red shirt occupation a decade prior. Their radical republicanism also proved somewhat double-edged. Opposition to the overt authoritarianism of the government had tended to override more wide-ranging forms of social cri-

186 John Reed 12 October 2020 'The king's money: Thailand divided over the $40bn question', *Financial Times*. https://www.ft.com/content/251d8aea-6939-4166-afe6-2df0176e0f8f

187 Bengali, Shashank, "The world's richest king, his mysterious fortune and Thailand's protesters who want answers", *Los Angeles Times*, 13 October 2020. https://www.latimes.com/world-nation/story/2020-10-13/thailand-king-richest-transparency

188 According to the 2021 Forbes Global 2000 list, Siam Cement Group was the second largest publicly-traded company in the country after the state-owned utilities firm, while Siam Commercial Bank was the fourth largest, followed by two Charoen Pokphand subsidiaries. However, if the family-owned Charoen Pokphand Group were not excluded from the list, it would rank at the top.

tique, with demands for substantial economic reforms largely replaced by calls for renewed liberalisation of the economy, albeit under a progressive guise. Nor did the new generation of protesters seem prepared for the repressive capacity of the state, which had been enhanced by an array of new sedition and cybercrime laws passed by the military regime. Riot suppression tactics had similarly been refined in the intervening years. Police firing tear gas and water cannons had largely replaced military units prone to fire live ammunition, and the government had become well-versed in scanning social media for dissent and crafting its own counter-narratives that drew on the still-popular language of anti-imperialism, accusing protestors of being funded by foreign NGOs trying to start a 'colour revolution' on behalf of the United States, which was supposedly attempting to wage a 'hybrid war' against Thailand – despite its continual diplomatic and financial support for the junta, including the supply of some 15 million USD for UAVs and Stryker vehicles in 2019.[189]

Echoing the simultaneous crackdown in Hong Kong, a state of emergency was declared in mid-October of 2020, giving the government even greater latitude in its response. By 2021, leading activists were being abducted, hundreds of others were being charged with sedition or with the crime of insulting the king, universities had banned staff and students from joining the protests, online media was blocked – with the government even mobilising the Computer Crimes Act to sue Facebook, Twitter, and YouTube for hosting anti-government content and breaking the law by making it accessible in Thailand – books were seized, and even the smallest demonstrations began to be met with heavy-handed police crackdowns. And, although the government amplified the voices of royalist counter-protestors throughout, outright conflicts between royalists and protestors were relatively subdued. This time around, the state clearly preferred to rely on 'rule of law' rather than risk the sort of civil conflict visible in the running battles between red and yellow shirts a decade prior.

189 This is not to say that there were no instances where older practices associated with military rule were not deployed, with reports of some protestors being tortured while detained and police accused of using live rounds. One protestor was shot by an anonymous assailant who was sitting inside a nearby police station. Royalist counter-protestors also continued to attack demonstrators, often using weapons. (Parameswaran, Prashanth 13 August 2019 'Is Thailand's Military Fighting a "Hybrid War" Threat?', *The Diplomat*. https://thediplomat.com/2019/08/is-thailands-military-fighting-a-hybrid-war-threat/; Quinley, Caleb 6 November 2021 'Thai protesters recount alleged torture under police custody', *Al Jazeera*. https://www.aljazeera.com/news/2021/11/6/thai-protesters-allege-torture-at-hands-of-police); The figure on US military aid comes from the official database on US foreign assistance (https://www.foreignassistance.gov), visible in two deals with the Department of Defense in 2019.

The aftermath was devastating. By the spring of 2021, nearly 400 protestors had been charged with various crimes, most of the alleged leaders had been placed in indefinite detention without bail, and more than 60 were accused of insulting the monarchy.[190] Since the protests had largely been financed by private donations raised in large part through crowdfunding – with the K-pop fandom in Thailand playing a crucial role – the state also made attempts to shut down fundraising efforts and prosecute donors.[191] Meanwhile, the Constitutional Court ruled that any reforms to royal institutions were unconstitutional and that leading activists had intended to 'overthrow the state and the monarchy.'[192] But, as in 2010, the state also sought to channel protests back into the formal political machinery, promising to hold elections as scheduled and at least initially refusing calls from far-right groups to dissolve Move Forward for fear of triggering even more expansive public anger.

Behind the scenes, rudimentary divides had also begun to emerge between protestors. Though ostensibly 'leaderless,' the demonstrations were led in practice by various student groups, some of which were more radical than others. By the fall of 2020, these groups had come together under the umbrella organisation Ratsadon, short for Khana Ratsadon 2563, or 'People's Party 2020,' referring back to the radical republican People's Party of the early twentieth century. But ongoing controversies over messaging, symbology, and various practical questions would become increasingly evident as repression increased and openly anti-monarchist positions grew more popular.[193] Ratsadon also lacked the expansive support network of community branches constructed by the red shirts during the Abhisit government. The formal party that had begun to emerge from the unrest thereby had few practical methods for maintaining its link with the historical party coursing beneath it. Twitter hashtags and widely followed Facebook pages are simply not adequate replacements for embedded institutions engaged in organising, education, and media work, especially beyond the bounds of city centres and university campuses. Carried solely on

190 Amnesty International 7 March 2021 'Thailand: Release peaceful critics and de-escalate tensions amid fresh wave of protests', *Prachathai English*. https://prachataienglish.com/node/9108

191 Maneechai, Tewarit 23 February 2021 'How did Twitter people and Korean idol stans shake up Thai politics?', *Prachathai English*. https://prachataienglish.com/node/9079

192 Bangkok Post 10 November 2021 'Constitutional Court rules activists aimed to overthrow monarchy', *Bangkok Post*. https://www.bangkokpost.com/thailand/politics/2213147/constitutional-court-rules-activists-aimed-to-overthrow-monarchy

193 Thai PBS World 23 December 2020 'Can Thailand's protest movement heal its ideological split', *Thai PBS World*. https://web.archive.org/web/20240714232028/https://www.thaipbsworld.com/can-thailands-protest-movement-heal-its-ideological-split/

inertia, memes lose force and sigils fade. These conditions then made it much easier for the basic economic programs offered by Move Forward and, to a lesser extent, Pheu Thai to become the *de facto* platform for the movement.

Unable to imagine decommodification as a potential horizon or to even address rudimentary questions of power over production, the radical republicanism of the students was thereby subordinated to an anti-monopolist program for liberalisation that had largely been set by economic elites, whether in the progressive guise of the younger generation of capitalists such as Pita or the new face of the old populist program of Pheu Thai represented by Paetongtarn. And the results were as might be expected. Move Forward swept the 2023 elections and, allied with Pheu Thai – now the runner-up – attempted to vote Pita in as prime minister, only to be blocked by the military-appointed Senate. Shortly thereafter, Pita was suspended from parliament entirely. In a dramatic about-face, Pheu Thai then broke with the opposition and negotiated a compromise with the conservative parties, who demanded that Move Forward be excluded entirely from the ruling coalition.[194] In exchange, Pheu Thai was given its choice of prime minister, initially selecting Srettha Thavisin, a property tycoon and old political associate of Thaksin and Yingluck. In another victory for Pheu Thai, the party successfully brokered a deal that allowed Thaksin to return to the country in early 2024. Soon after, the conservative alliance then moved to finally dissolve Move Forward on the ground that its proposed curtailments of the monarchy's power were unconstitutional. The move banned a dozen or so of the party's leaders, including election winner Pita, from participating in politics for the next decade.[195]

More significant than the return of the Shinawatras however, was the revival of Thaksinomics. After taking office, the Srettha government rolled out a series of business-friendly policies designed to draw in new rounds of foreign investment. These were then combined with vaguely populist policies drawn straight from the old TRT playbook: a debt moratorium for farmers and a cash stimulus in the form of a new digital wallet that will help track and tax the informal economy and more effectively extend credit to a larger portion of the population. Meanwhile, though the Move Forward platform (given a clear popular mandate by the election results) had promised to reform the *lèse majesté* law deployed

194 Tonsakulrungruang, Khemthong 7 August 2023 'A coup by any other name', *New Mandala*. https://www.newmandala.org/a-coup-kt-23/

195 Phoonphongphiphat, Apornrath 9 August 2024 'Thailand's disbanded Move Forward reborn as People's Party', *Nikkei Asia*. https://asia.nikkei.com/Politics/Thailand-s-disbanded-Move-Forward-reborn-as-People-s-Party; In response, Pita returned to the US to take up a position at the Harvard Kennedy School, his alma mater.

against arrested protestors, effectively promising them amnesty, the Pheu Thai administration has left them in jail and all but ensured that the monarchy remains off limits. Shortly after Move Forward was disbanded, Pheu Thai's final play was then unveiled as Srettha himself was unceremoniously ousted by the constitutional court. His replacement was none other than Paetongtarn Shinawatra, Thaksin's daughter. Once in power, Paetongtarn vowed to accelerate the Pheu Thai developmental program, including a commitment to doubling the minimum wage.[196] Despite repression from both enemies and former allies, however, the new generation was only emboldened. Within days, Move Forward had reconvened in the People's Party (its slogan: 'Liberty, Equality, Fraternity'), with all 143 of Move Forward's pre-existing members of parliament signing on to the new party, helmed by Natthaphong Ruengpanyawut, one of the scions of Chanuntorn Development Group, which specialises in the construction of luxury real estate.

More than a decade after Bangkok burned, mass politics therefore remained thoroughly subordinated to elite interests, despite a new generation of underemployed, overeducated youth pushing political discourse into unprecedented territory. Again, we find that the future of social struggle contours to the patterns of the past. In suggesting that the last few decades have marked a rebirth of history, Badiou is careful to point out that '*the riot is the guardian of the history of emancipation in intervallic periods*,' likening our own era to that of 1815–50 in Europe:

> ... for our own interval bears an uncanny resemblance to that Restoration. It followed the Great Revolution and, like our own last thirty years, its vertebral column was a virulent reactionary restoration, which was politically constitutionalist and economically liberal. Yet from the start of the 1830s it was a major period of riots, which were often momentarily or seemingly victorious (the 'Trois Glorieuses' of 1830, workers' riots pretty much everywhere, the 1848 'revolution', and so on).

And, despite being bound within their liberal limits and unable to conjure up any independent organisational force, the riots of the early nineteenth century nonetheless seeded the communist movement to come: 'after 1850 the republican idea, now insufficient for demarcation from bourgeois reaction,

196 Al Jazeera Staff 16 August 2024 'Who is Paetongtarn Shinawatra, Thailand's new youngest prime minister?', *Al Jazeera*. https://www.aljazeera.com/news/2024/8/16/who-is-paetongtarn-shinawatra-thailands-new-youngest-prime-minister

would have to be succeeded by the communist Idea.'[197] Just as 1848 produced the *Communist Manifesto* and the First International, so too does there exist a bleak hope that the communist conclaves today coming together in the heat of battles raging at the heart of the necropolis might seed the sort of party that could someday shake the very pillars of production.[198]

And yet we nonetheless remain mired in the bloody discharges of our 'intervallic period,' watching again and again as unrest births a stillborn subject. The sigils burn bright in the fog, drawing thought to leap ahead of any practical power. The dead rise from the shadows but, soon enough, all are pressed back into place by the armed force of the state. During the 2010 occupation, a recurring image that protestors recounted to Sopranzetti was the jarring experience of seeing protestors' brains splattered on the asphalt after military massacres. Likely due to a typo or possibly just poor English, one picture stands out: '"There was a brain left on the street," a young woman with small dark brown eyes, almost lost in the sea of red that colours her head, body, and neck, tells me.'[199] Not blood and skull splattered on the pavement, but instead an image of an entire brain left whole on the pavement after the tanks have passed, quivering in the heavy heat. What is presumably a typo or a linguistic mistake thereby provides a haunting symbol of our era's political predicament: an excess of thought and an absence of body, with critique incapacitated by its separation from practical power and partisans as exposed to repression as that brain shuddering under the ruthless sun. The construction of a communist party is something like the opposite. The brain (Badiou's 'communist Idea') less an organ than a void or bottomless wound drawing the red tide of blood around it, soaking up the sewage of the city, grinding together the abandoned rebar weapons and the tattered sigils and the asphalt broken by the bullet strikes to form a new immortal flesh in the revolutionary party – deathless and terrible, wings burning with the sublime fire of what seems at first another world but is just this old one broken open and pulled beyond the prison of its skin.

197 Badiou 2012, p. 41.

198 It is also notable that the 'era of riots' that peaked in 1848 also forced Marx and Engels into exile. The failure of the populist politics of this era thereby challenged them to formulate a more rigorous critique of both the present world and the programs of their socialist and republican compatriots.

199 Sopranzetti 2012, p. 27.

CHAPTER 10

Dice in the Sand

Bright fabric spilled out into the darkness. The vibrant colours of *vitenge* clashed with the muted mud-tones of the mostly empty mall. Along each side were long lines of similar stalls etched into the wall like shallow grottoes, all cold and lightless save for this single open shop, a lone shrine to the spirit of commerce glowing in the wilderness. In fact, the only other businesses that seemed to be open in the shopping complex were the Pizza Hut on the plaza outside, a store across the plaza selling factory-made furniture imported from Asia, and the brightly lit grocery store on the ground floor blaring Bollywood music. Elsewhere, the AC was off and the lights were dim or dark, the bowels of the building shrouded in humid shadow. Even the escalators were frozen into stairs to save electricity. On the plaza below, there were a spare few customers moving slowly about their daily business. On the floors above, there seemed to be none. But the space was not old. There was little dust, and the paint showed few signs of wear or mildew despite the tropical heat. I wandered the unlit hallways quietly, my breath stirring the stagnant air like a trespasser in some hallowed tomb outside of time.

Then, from an unseen fold in the darkness behind me, I heard a voice: 'There isn't anything open down there.' The Swahili syllables rolled out toward the point in the distance where the shadows gathered into an impenetrable wall, and where even the echo of the voice seemed to drop away in the silken blackness, almost organic – not an unlit but a sightless one, like I had reached the edge of the world of substance and peered out now onto the stygian pitch of formless, writhing nullity from which the world had been wrought in all its agonies of light and to which it will at last return when the exhaustion of entropy unmoors the myriad forms. The security guard stepped forward to stand beside me. Not to block my way, exactly, but instead simply observing my decision: to walk forward into dark annihilation or retreat back into the illuminated world. I thought for a moment and then chose to neither leave or proceed, thereby balancing the two at their pendular centre: the axis from which course the world's winding paths. I smiled and introduced myself and we sat down on a bench at the border between shadow and abyss, running through the warm, ritual formalities of the language. Names and news and casual observations. Finally, she asked me the obvious questions of where I was from and how I had made my way to this city in the sand.

The mall was dropped in the chalk-coloured dust at the edge of an industrial district in Dar es Salaam, the economic capital sprawling across Tanzania's

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coastal plain. I had come to the city in January of 2020 (the middle of a hot and humid summer in the southern hemisphere) to complete the final leg of field work for my dissertation: an on-foot survey of Chinese manufacturing firms operating in Dar es Salaam's industrial districts. Leaving and returning to my apartment on the outskirts of the central city each morning, I would pass fruit-sellers who had set up makeshift stalls in the shade of enormous roadside trees filled with chirping fruit bats. As the air cooled in the evening and I returned to the apartment after a long day of walking through dust and sun, the bats would alight in massive black clouds above me, swarming through the gaping windows of unfinished apartment towers and swooping down into the mangrove swamp beneath the old Selander Bridge.

In retrospect, the bats (and the guano-dappled fruit stalls below) would become a dim omen of the approaching pandemic. At the time, though, they seemed to simply symbolise a bustling nightfall in one of the world's fastest-growing cities. Everything appeared half-built. The glinting glass and steel of the new, mostly-empty office towers on the waterfront was matched by the skeletal form of unfinished skyscrapers looming over the very centre of downtown. Further down, the road itself was under construction, as was a neighbouring seawall that seemed barely able to hold back the rising tide, much less an ocean swelled by glaciers calving at the poles. Beyond it, the tide flats glistened under the equatorial sun. At low tide, I could see the indistinct silhouettes of people in the distance picking through the shapeless mud for things to eat or use or sell. And, beyond them, heat-haze draped over the churning waters, smudging out the horizon in a continuum of shimmering sand and wave and sky pale as coral stone.

Straddling the equator, the Swahili Coast sees every new year inaugurated in a season of sun-scorched humidity as hot monsoon winds curl down the seas from the Arabian Peninsula. The dry season is then slowly eroded by rainstorms of increasing intensity, as the brief summer gives way to the first, and longer, of the region's two growing seasons in February. Historically, this was a crucial period in the monsoon trade that stretched across the Indian Ocean, with dhows setting out from port cities in Oman and India early in the season and arriving as it drew to a close.[1] Even though this regional commerce driven by wind-powered vessels has been replaced by global trade networks reliant on petroleum-powered container ships, the coast's commercial history persists as more than just an echo. In the abstract sense, the vestigial structure

1 Historian Abdul Sheriff provides the classic accounts of the Swahili Coast's role in pre-capitalist Indian Ocean commercial networks. For the period prior to 1500: Sheriff 2010; for the eighteenth and nineteenth centuries: Sheriff 1987.

of the Indian Ocean trade remains visible in the geography of modern logistics. Even where the old monsoon ports have been displaced – with Zanzibar unseated by Dar es Salaam and Muscat by Dubai – the new maritime hubs have retained both a geographic proximity and a certain cultural continuity with earlier routes.

In the more literal sense, the dhow trade is itself alive and well, with small-scale coastal commerce, fishing and portage services not merely subsisting in the interstices of global shipping and formal trade but thriving at the centre of the region's enormous informal economy. On any given day in Dar es Salaam, you can see dhows pulled up on beaches near the fish market down the street from the presidential palace, their owners offering short trips across the bay. At high tide they can be seen coursing in the shallow waters, making short trips up the coast or across to outlying islands. At low tide, the boats sit offering shade in the sandy waste. This is the teeming life of the city, visible everywhere in the many methods of informal subsistence. In contrast, the formal economy is only visible in the distance, at the very edge of sight, where container ships can be seen lined up on the horizon like a mirage of those far-off continents looming somewhere beyond the monsoon.

In recent years, the line of ships has only grown longer as the rapid growth of the Tanzanian economy has overspilled the capacity of the port of Dar es Salaam. Between 2001 and 2019, GDP growth in the country was above 5 percent every year but one (dipping to a low of 4.5 percent in 2019, peaking at a high of 7.7 percent in 2011), on par with rapidly industrialising Vietnam.[2] In those same years, Dar es Salaam had become one of the world's fastest-growing cities, with the population increasing from just under 2.5 million in the year 2000 to an estimated 6.7 million in 2020.[3] Both migration and high total fertility rates have contributed to this boom, with Dar es Salaam now ranking as the largest city in East Africa and Tanzania among the 9 or 10 countries estimated to contribute the bulk of global population growth through 2050.[4] Though initial projections predicting a further doubling of the city's population by the 2030s now look overambitious due to slowed growth in the 2020s, the metropolitan area is nonetheless likely to exceed 10 million by the close of the decade.

2 According to World Bank indicator NY.GDP.MKTP.KD.ZG.

3 Rosen, Jonathan W. 5 April 2019 'This Tanzanian city may soon be one of the world's most populous. Is it ready?', *National Geographic*. https://www.nationalgeographic.com/environment/article/tanzanian-city-may-soon-be-one-of-the-worlds-most-populous

4 UN 2019 'World Population Prospects 2019: Highlights', *United Nations Department of Economic and Social Affairs, Population Division*. https://www.un.org/es/desa/world-population-prospects-2019-highlights

The role of migration in the growth of the city is particularly significant, since most urbanisation (and associated enclosure and proletarianisation) across Sub-Saharan Africa since at least the Third World Debt Crisis of the 1980s has been driven not by migration, but by *in situ* demographic growth.[5] Other cities in the country have largely followed this pattern of 'demographic proletarianization.' Since the 2002 census, for example, Arusha has seen limited growth and both Shinyanga and Mwanza recorded more out-migration than in-migration. But, in Dar es Salaam, migration has been the major driver of urbanisation. Roughly 53 percent of the population had birthplaces outside of the city as early as the 2012 census. Settling down and having their own children, this increasing population of in-migrants then further accelerated the demographic trend. As a result, Dar es Salaam is now set to become the major East African representative of a new series of megacities emerging across the continent, joining Lagos, Kinshasa, and Cairo as a magnet for migrants driven from the countryside by marketisation.

As a result, the city's built environment has also flooded beyond its earlier bounds, with new roads, bridges, commercial skyscrapers, and high-rise residential towers sprouting up with little apparent pattern or plan. While the rapid rate of population growth helped to attract financing for the city's boom, even the smallest of the new apartment complexes are inaccessible for the average urban resident. Thus, most of the city's *de facto* build-out came in the shape of the sprawling informal settlements skirting the new towers and spreading out horizontally on any unsettled land. By the 2010s, upwards of 70 percent of Dar es Salaam's population resided in the hand-built housing of these neighbourhoods, called 'slums' in international media reports but colloquially referred to as *uswahilini*.[6]

Both Tanzania's murky land tenure system and the physical geography of the coastal plain facilitate this horizontal sprawl of peri-urban settlement.[7] But the lack of systematic urban planning or any rigorous oversight has also led to poor utilities access and extreme exposure to deadly floods in the rainy season, which often wash away entire neighbourhoods.[8] Similarly, many of these neighbourhoods now border the growing industrial zones, separated only by walls and barbed wire from power plants and factories that pollute the land, air, and water nearby (see Photo 12). Such haphazard, horizontal urbanisation has coexisted alongside, outside and beneath the city's more formal develop-

5 Benanav 2019.
6 Rasmussen 2013; Limbumba and Ngware 2016.
7 Sylivester 2013; Mughwai 2019.
8 Rosen 2019.

PHOTO 12 *Uswahilini* settlement near the Ubungo Power Plant
AUTHOR, 2020

ment, which is marked by the vertical growth of new skyscrapers in the central business district and residential apartment towers throughout the urban core, both of which are global in almost every sense: they house the city's international elite, host offices for multinationals, and were built at least in part with excess capital pouring out of real estate booms in places like China and Turkey. The result is a deeply disjointed urban complex, where half-finished or mostly empty condo towers speckled with the sharp white light of welding torches or the soft yellow glow of a spare few inhabitants otherwise loom dark in the night, towering above the true life of the city: the glow of bustling *uswahilini* beneath and beyond, spilling out in every direction.

Though vaguely based on expectations of future growth – comparisons to Shenzhen are common – the speculative dimension of urbanisation in the city is equally stark, each of the high-rises a gamble funded by excess capital sloshing against the shoreline from overseas. But the informal settlements were also their own sort of gamble, with higher stakes: a bet that work could be found, that the seasonal floods wouldn't wash the makeshift houses away, that the migrants' land claim would be acknowledged by local officials. Overall, the result was a deeply uneven experience of simultaneously accelerated devel-

opment and dependency, embodied in the equally uneven geography of the built environment. As described by geographers James T. Murphy and Pádraig Carmody:

> ... the city is developing in highly uneven ways that do not seem to be fostering the distributional benefits that accompany generative forms of urbanization. The production regime is failing to foster value-adding basic (tradeable) manufacturing industries able to provide significant employment and improve the exchange value of what the city produces in national, regional, and global markets. Industrial downgrading is occurring instead as many SMMEs [small, medium and micro-scale enterprises] turn to commercial activities as upgrading opportunities in production are closed off by imports ... The consumption regime has been enhanced in some ways through imports which increasingly meet the needs of consumers across all socioeconomic categories. However, a process of intraversion means that much of the profit that wage good consumption creates is channeled offshore to the places where these goods are manufactured. Finally, the infrastructure regime unevenly and inadequately distributes the basic services and collective goods crucial for social upgrading; further raising doubts that inequality levels in Dar es Salaam can decrease in the coming years. All told, Tanzania's urban transition can currently be characterised as a splintered, parasitic process that is failing to structurally transform the economy in ways that can promote industrial upgrading, expand wealth distribution, and capture the value of export-driven growth locally such that investments in collective goods and social upgrading might increase and be sustained.[9]

Nor is this unique to Dar es Salaam. Instead, philosopher Achille Mbembe argues that the condition is shared across much of Africa, which is seeing acceleration

> towards a kind of capitalism that is mostly disjointed, almost galactic in the sense that [it] consists of a seemingly random collection of disconnected enclaves. These enclaves are incongruously linked together in a contrived form that cannot be easily grasped within the conventional analytical paradigms. It is a capitalism of multiple nodal points, of scattered patterns, of spatial growth combined with neglect and decline.[10]

9 Murphy and Carmody 2018, p. 148.

10 Mbembe, Achille 29 June 2016 'Africa In The New Century', *Africa is a Country*. https://africasacountry.com/2016/06/africa-in-the-new-century

In other words, the urban territories taking shape across the continent today are complex and conflictual spaces not easily accounted for by conventional theories of development or dependency.

1 Urban Fragments

Overly simple divides between the 'formal' and 'informal' economies, between the 'slum' and the apartment complex, and even between the urban and the rural do not quite capture the intricate interdependence of subsistence and speculation that defines life in such a place. Dar es Salaam is a fragmented city, certainly, but its many fragments of speculation and survival are also interdependent, woven together through the very rituals of commerce that produce this unevenness in the first place. The mall itself was simply one die among many scattered in the sand. Assuming that the building had just been completed, I asked when businesses would start moving in. But the security guard shook her head. The building wasn't new, she explained. Construction had finished earlier in the decade at the height of the commodities boom and, as soon as the doors opened, business had been booming. The project was funded by foreign investors – she didn't know from where – but most of the spaces were rented by Tanzanian vendors selling imported goods.

At the time, cash was flowing freely in the upper echelons of the city's social scene, as the boom spilled over into the speculative development of shopping centres and luxury condos, demand for which was buoyed by the equivalent boom in conspicuous consumption. Such spaces embossed the alluring but ultimately deceptive image of a rising 'African middle class.'[11] I was myself renting a room in just such a 'middle class' apartment complex built by a Chinese construction firm in the middle of the decade. Across the street was an even newer building, constructed, owned, and managed by AVIC International, the overseas holding corporation of major group company Aviation Industry Corporation of China (AVIC), the second-biggest defence contractor in China. Like many other group companies, AVIC had expanded out of its core industrial sector (aerospace) into a range of other product lines in the course of China's own rapid industrialisation, soon finding that its real estate subsidiaries had proven particularly lucrative in the domestic building boom that followed the Great Recession. When the construction sector in China grew saturated, con-

11 Melber 2017.

glomerates like AVIC then poured excess capital into overseas acquisitions and construction projects.

When I asked why the shops had closed, she simply shrugged: it was not profitable. The higher-end retail outlets had been skimming the top of a larger bubble. By the middle of the decade, the commodities boom had faded and, soon after, the real estate sector began to cool. The same conundrum then emerged throughout Sub-Saharan Africa: declining terms of trade meant that payments on lucrative loans taken out at the height of the boom were now more expensive and, at the same time, continued buildouts of infrastructure were now only possible by taking out more loans on worse terms, since the price of assets used as collateral had declined. Countries were therefore faced with the option of either letting projects stall while they deleveraged and reoriented the devalued pool of national income to support priority infrastructure and subsistence activities until they could restructure their tax base – this was more or less the path pursued by the Magufuli administration in Tanzania from 2015 onward – or proceeding beyond the fiscal cliff through new rounds of financing, in the hopes that new loans could bridge the gap until a future boom restored their terms of trade. Ultimately, then, my initial impression had been entirely backwards. The few shops I had seen were not the first in but the last left. Maybe business would come back, the security guard speculated. For the time being, however, high-end consumption had retreated to one or two more established redoubts closer to the high-income districts.

For most people, the lifecycle of the mall hardly mattered. The vast majority of the population in the city bought their goods at low-end, open-air markets rather than in air-conditioned grocery stores. Many of these were located on the city's periphery, in rapidly growing wards like Mabibo and Tandale. But the largest of the markets was in nearby Kariakoo, a hyper-dense neighbourhood where traders rent out stalls in the basements and on the ground floors of tight-packed market buildings while more informal vendors crowd out onto the sidewalks and even the streets. In Kariakoo, the very flow of commerce serves as a sort of obstruction wedged in the heart of the city. These petty traders are known as *wamachinga* (sg. *machinga*) in Swahili, one of many subtle linguistic markers mapping out the murky divide between formality and informality, itself inset into racialised trade hierarchies rooted in long colonial histories and now reinforced and reinvented by modern supply chains and pulses of migration. At times, it seemed as if the market was less a mundane, three-dimensional space than a four-dimensional condensation of time, flooding over the streets much like the monsoons that once saturated the coast with trade – a place where hundreds of years of commercial history were compressed into a few city blocks.

Simply moving through Kariakoo on foot is often a struggle, as bodies blocked together to form a sort of human maze. The act of buying and selling is also a labyrinth. Unlike the clearly priced goods in the well-lit grocery store on the ground floor of the mostly abandoned mall, the products, prices, and even place of purchase in Kariakoo are all amorphous, the outcome of complex global chains of formal commerce woven together with the art of negotiation that remains the basic substratum of exchange in much of the world – and especially among Tanzanians, for whom a casual conversationalism is knit into the very fabric of Swahili sociality. For this reason, it was often unclear if people were actually buying things or simply chatting, arguing, telling jokes, or seeking solace. Surrounded by the press of bodies, I sought out garment sellers (all Tanzanians) who would make the trip back and forth from the wholesale markets of Yuexiu District in Guangzhou to Kariakoo, explaining that I'd also lived in Guangzhou, asking them about how they got into the business, and how they liked living in China. Even when I explained that I wasn't really looking to buy anything, the wide-ranging conversation would nonetheless be pockmarked by a staccato of changing prices, often dropped as non-sequiturs and used almost like a novel form of punctuation marking out the shift between different tones and topics.

During the urban boom, the *wamachinga* in Kariakoo and elsewhere were often portrayed as an archaic hindrance to the construction of modern infrastructure. For this reason, they were subject to repeated evictions, with each relocation campaign exposing traders to threats, police beatings, periods of detainment, and numerous thefts and fires of mysterious origin. By the early 2020s, the government had even begun to use the grim euphemism of 'cleansing the city' as a sort of slogan for its assault on the informal economy.[12] But these were hardly new themes. In fact, they were only the latest iteration of a social conflict that has replayed in much the same form since the city's founding. Even at the earliest stage in its history, when it was a colonial outpost of the Omani sultanate based on Zanzibar, Dar es Salaam was divided into three zones distinguished by different degrees of commerce and authority, which also mapped onto *de facto* ethnic divides. The segmentation was more or less concentric, with the urban core of stone buildings around the harbour forming the centre of administration and larger-scale commerce, surrounded by a productive complex of plantations owned 'owned by the Sultan or his Arab allies

12 Braun, Dorothee 8 February 2022 'What You Don't See Doesn't Exist', *Rosa Luxemburg Stiftung*. https://www.rosalux.de/en/news/id/45895

and worked primarily by unfree labour,' which gave way to native (Zaramo and Shomvi) villages at the urban periphery.[13]

When the Germans took control toward the end of the nineteenth century, they left the tripartite structure of the Sultanate largely intact, even while shifting its economic basis to include both the more militarised activities of the new colonial government and the slowly growing influence of Indian (mostly Gujarati) traders. Under German rule, the divide not only became more explicitly racial, but also systematically coded race into the built environment itself, with the 1891 Building Ordinance formalising racial divides via 'separate building standards of European, Indian, and African homes, rather than through biological definitions of race.'[14] The policy worked hand in hand with the subsequent Land Ordinance passed in 1895, which distinguished peri-urban lands that were communally owned from 'ownerless' plots. Standards were thereby established for Europeans to buy collectively managed lands via the mediation of local customary leaders (*majumbe*), some of whom would become wealthy planters through these transactions.[15]

But much of the land held by Africans was deemed 'ownerless' simply because residents could demonstrate no proof of their claim. These lands were then legally subject to seizure and occupation by the German East Africa Company. However, given that there was not much incentive to develop these lands, those living on them did not necessarily have to leave. They instead gained a somewhat ambiguous status as squatters on company property, much of which was later handed over to the German government. This practice would eventually evolve (under the British) into the system of *kiwanja* tenure, 'whereby tenants paid rent to the government, and tenure was terminable at six months notice.'[16] As state-led development began to increase in the lead-up to the First World War, Kariakoo was founded in 1913 as a planned 'African' district by the Germans, complete with 'an adjacent *cordon sanitaire* … that would separate it from the rest of the town,' and an updated Building Ordinance the next year envisioning intensified state investment in urban infrastructure alongside even more explicit racial segregation in urban administration.[17]

When the Germans lost the war, the territory was given over to the British, who hardened the tripartite racial division even further. They demolished

13 Brennan, James R. and Burton, Andrew, 'The Emerging Metropolis: A history of Dar es Salaam, circa 1862–2000,' in Brennan et al. 2007, p. 21.

14 Brennan and Burton 2007, p. 24.

15 Brennan and Burton 2007, pp. 24–6.

16 Kironde, J.M. Lusugga, 'Race, Class, and Housing in Dar es Salaam: The colonial impact on land use structure, 1891–1961,' in Brennan et al. 2007. pp. 99–105.

17 Kironde 2007, p. 29.

houses that had popped up in the sanitary buffer, gave much of the central city over to South Asian traders and lower-level administrators, and further developed the upscale suburbs to the north. By the 1930s, the city had become clearly and legally demarcated into an 'African' zone (*Uswahilini*) formally covering Kariakoo and *de facto* extending into peripheral villages that had just begun to see the impact of the migration boom, an increasingly dense 'Asian' zone (*Uhindini*) concentrated in the urban core, and a European zone (*Uzunguni*) defined by garden compounds that extended across the Msasani Peninsula and remained largely separated from the city centre by a mangrove swamp at the mouth of the Msimbazi river. From the Omanis to the Germans to the British, we can see how the increasingly formal racial zoning of the colonial territory accompanied its conversion into the cadastral space of capital. Race was not an incidental feature of the process, but instead the wedge used to force the separation of the people from the land on which they subsisted. This then ensured that the metabolic gap could only be bridged through monetised relationships overseen by both 'traditional' leadership and the colonial government.

Though formal segregation was abandoned in the postcolonial period and efforts were made to even out rural-urban and interethnic inequities during the *Ujamaa* era – which saw state-led industrialisation efforts inspired by President Julius Nyerere's vison of 'African Socialism' – the deeper divide would nonetheless persist to the present. Today, Dar es Salaam's salient class divisions clearly retain the vestigial trace of these older systems of segregation, visible in linguistic customs such as the continued usage of *uswahilini* to refer to the informal settlements that house the majority of the city's population. Similarly, neighbourhoods such as Oyster Bay (in historic *Uzunguni*) still host the bulk of the city's wealthy foreigners, and neighbourhoods such as Upanga (at the heart of the old *Uhindini* zone) are still disproportionately South Asian. In much the same fashion, Kariakoo remained a centre for more general anxiety over rapid urbanisation. As early as the 1930s, the neighbourhood began to see an influx of young, largely uneducated migrants from the countryside, overspilling the narrow economic base of formal employment on remaining plantations or in domestic service and dock work. These underemployed migrants were soon demonised as '*wahuni*.'[18] Often translated as 'hooligans' (and, after the advent of the city's hip-hop era in the 1990s, as 'gangsters' or 'thugs'), the term comes from the Swahili verb *-huni*, which describes disobedient, idle, or unstable activity. It therefore came to indicate a general rootlessness and vague criminality. Simil-

18 Brennan and Burton 2007, p. 36.

arly, the *wahuni* were soon associated with youthful immorality and the social anomie of urban life, which also made them a favoured target for both the colonial and post-colonial governments. Faced with an economic downturn after World War Two, for example, the British organised a series of '*wahuni* raids' targeting young male migrants who were repatriated to their rural homes *en masse*.

Though the postcolonial period initially saw formal employment grow alongside industrialisation efforts, the city's un- and underemployed youth would again become a major source of anxiety when the developmental project began to falter. As early as 1978, a quarter of working-age (16–40) men in the city were unemployed and, in 1979, the majority of the urban population was housed in unplanned settlements. By the middle of the next decade, 'those entirely reliant on some form of self-employment (including urban agriculture) had increased dramatically to around 60 percent of the adult population; whilst two-thirds of those with waged work were also reliant on self-employment to get by.'[19] Today, the situation is even more extreme. As of the early 2020s, 'almost 75 percent of Dar es Salaam's 6.4 million inhabitants belong to the urban poor. Most of them live in informal settlements and engage in petty trade. Others work in services like shoe repair, horticulture, collecting plastic bottles, or casual work.'[20]

Under Magufuli's administration, a *détente* had briefly prevailed in which many working within the informal economy were either given new formal rights – for example, within the tanzanite sector, where the government established open fields to be used by artisanal miners and placed a floor on prices by stepping in as a guaranteed buyer – or were at least no longer exposed to repeated assaults by authorities. In 2018, petty traders were even given formal '*Wamachinga* IDs' in exchange for a small fee paid to the central government, centralising levies on informal trade, serving to formalise otherwise difficult-to-measure forms of commerce, and providing *wamachinga* with some degree of official recognition.[21] In contrast, the subsequent Hassan administration began to slowly withdraw support for much of the informal economy. In mid-2021, for example, a fire in one of the market buildings in Kariakoo gave the government

19 Brennan and Burton 2007, p. 61.

20 Dorthee Braun and Sabatho Nyamsenda 17 November 2021 'Sweeping Away the Grime of the City', *Rosa Luxemburg Stiftung*. https://www.rosalux.de/en/news/id/45380/sweeping-away-the-grime-of-the-city

21 George, Constantine, Colman Titus Msoka and Hezron Makundi 2022 'Formalisation of Street Vending in Dar es Salaam: Implementation and Enforcement of the Wamachinga Identity Card Initiative', *Forum for Development Studies*, Vol. 50, issue 2, pp. 283–302.

an excuse to again try and clear the neighbourhood. Street vendors were given 30 days' notice to relocate to state-designated market areas, most of which were outside the city or in inaccessible locations such as rooftops and alleyways.[22] The early 2020s therefore saw a general renewal of the assaults on informality, returning to the norm.[23]

Since these inequities emanate, in large part, from global class divides, they have also transformed alongside changes in the structure of imperial power. In the twentieth century, the ascent of American capital to a hegemonic position within the global economy reinforced old colonial dependencies largely through the informal empire of the market. This involved the selective buy-in (or direct placement, via coups) of a subsidiary echelon of native elites within nominally independent states across post-colonial Africa. In Dar es Salaam, the rise of this Tanzanian upper class was evident in the diversification of upscale areas of the city as newly wealthy bureaucrats and businessmen purchased their own estates scattered between the foreign embassies stretching up through the Msasani Peninsula. Later, the same demand would also help to facilitate the speculative build-out of skyscrapers in the urban core and luxurious residential complexes in the exurbs. But the maturation of the US imperial order also brought with it substantial shifts in the power structure of global production as new blocs of capital rose in East Asia and the Gulf States.

In Tanzania, this changing geography of accumulation was visible as early as the 1960s, when Japan first began financing major developmental projects.[24] Similarly, official developmental assistance (ODA) from South Korea began increasing after the turn of the millennium, totalling some 80 million USD

22 Braun and Nyamsenda 2021.

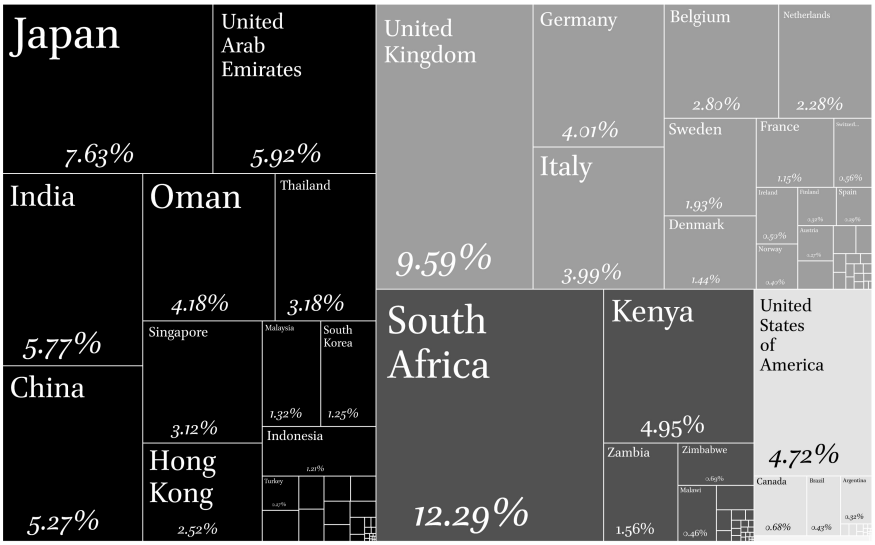
23 Meanwhile, on the other end of the informal economy, 2022 saw Maasai pastoralists violently evicted from ancestral lands in rural Ngorongoro. Though environmental protection was given as the ostensible reason, the area has seen repeated eviction attempts supported by an Emirati firm (Otterlo Business Corporation) that organised tours and hunting trips in the area. Abdulrahman Kinana, the general secretary of the ruling party (the Chama Cha Mapinduzi, or CCM), is a major shareholder in the firm. (Jeannin, Marine 23 June 2022 'In Tanzania, the Maasai are evicted from their land in the name of wildlife protection and tourism', *Le Monde*. https://www.lemonde.fr/en/international/article/2022/06/23/in-tanzania-the-maasai-are-evicted-from-their-land-in-the-name-of-wildlife-protection-and-tourism_5987719_4.html)

24 Japan's role has remained important to this day, with the country contributing a total of some 2 billion USD in official development assistance as of 2022, when a new round of multimillion dollar road, water treatment, and port expansion projects were signed. See: The Citizen 24 February 2022 'Japan's rich tradition and history with Tanzania', *The Citizen*. https://www.theCitizen.co.tz/tanzania/supplement/japan-s-rich-tradition-and-history-with-tanzania-3728468

Imports to Tanzania

1995, by Trade Partner

Total: $1.41 Bil.



Source: Comtrade

FIGURE 26 Imports to Tanzania, 1995

between 2002 and 2015.[25] After the privatisation campaigns launched by president Benjamin Mkapa in the latter half of the 1990s, the country similarly saw steadily rising FDI from South Africa, East Asia, Saudi Arabia, the UAE, Turkey, and Egypt, as well as from more traditional partners such as Oman and India. The geography of major trade partners was much the same, especially as sources of imports (see Figures 26 and 27, comparing major import partners in 1995 and 2020, respectively). Nonetheless, as in other 'developing countries,' the magnitude of total FDI remained low relative to total ODA, and certainly lower than broader measures of aid.[26]

In Dar es Salaam, these subtle changes in the geography of imperial power were similarly echoed in the built environment. Selander Bridge offers a par-

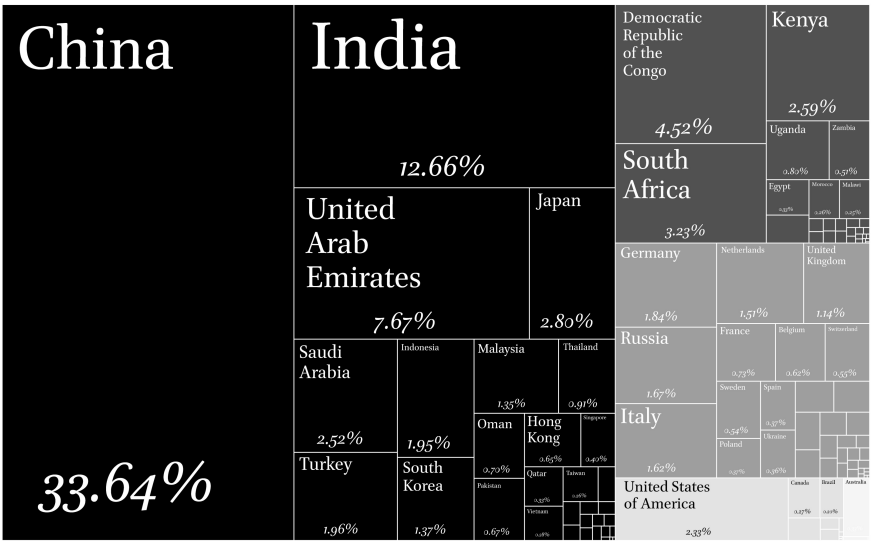
25 The Citizen 13 April 2021 'Why South Korea plans to raise aid to Tanzania', *The Citizen*. https://www.theCitizen.co.tz/tanzania/news/national/why-south-korea-plans-to-raise-aid-to-tanzania-2650476

26 For example, according to UNCTAD data, total inbound FDI flows reached a peak of roughly 2 billion USD in 2013 but, in that same year, the total ODA from 'official donors' (as recorded by the OECD) was more than 3.5 billion. The same basic relationship prevailed for

Imports to Tanzania

2020, by Trade Partner

Total: $10.5 Bil.



Source: Comtrade

FIGURE 27 Imports to Tanzania, 2020

ticularly symbolic example. Built by the British colonial government in 1929 and spanning the mouth of the Msimbazi river and the surrounding mangrove swamp, the bridge linked the wealthy estates on the peninsula to the urban core, thereby enabling the development of the area as the official European district. Then, in 1980, the bridge was reconstructed by the Japan International Cooperation Agency as its first road project in the country. By that time, the population of the peninsula had diversified, including a host of embassies, banks, aid agencies, and the estates of both the most prominent traders and wealthy bureaucrats. Though the Japanese-built bridge remains in place, it has now been overshadowed by the 'New Selander' or 'Tanzanite Bridge,' completed in 2022. The new bridge was jointly financed by the Korea Economic

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Chinese ODA and FDI as well, with the total FDI stock owned by Chinese firms amounting to roughly 1.5 billion by the early 2020s, compared to some 2.4 billion in total loan commitments (according to data from the Chinese Ministry of Commerce and the China Africa Research Initiative, respectively). Meanwhile, most aid still comes in the form of concessional loans from the wealthiest countries and from established multilateral institutions such as the IMF and World Bank, not from outright grants.

Development Cooperation Fund and the Government of Tanzania, with South Korean firm GS Engineering and Construction serving as the main contractor overseeing the project.[27] Much of the day-to-day construction, however, was subcontracted to China Railway Seventh Group, leading many local residents to mistakenly refer to the bridge as a 'Chinese' investment.

Complex chains of financing, contracting, and sub-contracting linked to financers across Asia and Africa were evident in the construction of new skyscrapers, the build-out of the port, the revamping of the city's bus system, the expansion of the electrical grid, and the laying of a new standard-gauge railway throughout the 2010s. Though the frequent involvement of Chinese construction and engineering contractors at the ground-level of such projects would lead many to treat them as evidence of growing Chinese influence – or even to treat them as examples of outright Chinese ownership – the vast majority were the product of similarly nested chains of finance and sub-contracting that basically mirrored the geography of accumulation at the global scale and almost always involved facilitation by Tanzania's own elite.

2 The Mirage

Ultimately, the growing influence of Chinese capital within the world market has been far more visible in the sphere of trade than aid or investment. In Tanzania, the cost-competitiveness of Chinese manufactures had already begun to unsettle established trade hierarchies within the city by the late 2000s. In the end, the old monopoly of the South Asian commercial class was finally broken under the combined force of direct competition from Chinese wholesalers and the indirect advantages given to African (especially Chagga) traders, who were now able to buy cheap Chinese-made goods on regular trips to Dubai or Guangzhou. By the 2010s, the centrality of cheap Chinese manufactures had become visible in the growing importance of Kariakoo as the *de facto* commercial centre of the city, acting 'as the key entrepôt for imported goods, which, by 2014, accounted for 70 per cent of trade,' despite continual assaults by urban

27 Whenever the Government of Tanzania is listed as a major source of financing, this does not mean that a project was funded through fiscal means (i.e., using tax dollars) but instead by taking on sovereign debt, which largely means it was financed through loans from multilateral agencies like the IMF. See: Were, Were and Mollel, Lekinyi 2020 'Public debt sustainability and debt dynamics: The case of Tanzania', *WIDER Working Paper*, 112. https://www.econstor.eu/bitstream/10419/229336/1/wp2020-112.pdf

planners.[28] The market sits at the interface between the central business district, the area surrounding the country's sole deepwater container port, and the country's largest industrial district running out to the international airport. Meanwhile, many of the goods sold in the market could be traced back to Chinese factories or at least to Chinese wholesalers operating in cities like Guangzhou and Yiwu. Many Chinese wholesalers from these areas had also opened trading companies within Tanzania to facilitate the process, and some even operated their own streetside shops in Kariakoo, an activity that had previously been the purview of mostly-African *wamachinga*. By 2015, there were an estimated 30 to 70,000 Chinese residents in the country, most in Dar es Salaam.[29]

By the end of the decade, many Chinese firms had also opened warehouses in the nearby industrial districts to facilitate bulk storage of high-demand items like door frames and other building materials. Some had even expanded to launch their own local manufacturing lines, the largest of which were a series of factories cutting and shaping sheet metal roof panels, altogether employing several hundred local workers. But the reality of Chinese investment in Tanzanian industry was far more meagre than the mythos that had been built up around it. Throughout the 2010s, Tanzania had come to play a central role in the flurry of media reports on 'China in Africa,' all of which predicted an imminent a tidal wave of Chinese investment set to pour into the continent. Many of these reports claimed that we were witnessing the early stages in a new wave of industrialisation, with Chinese FDI helping to fund the rise of 'African Lion' economies much as Japanese FDI had once helped finance their 'Asian Tiger' predecessors.[30] Some even predicted that Africa would become the 'next factory of the world.'[31] The narrative gained widespread support within China itself and was even adopted by major multilateral institutions. For example, former World Bank Chief Economist and Senior Vice President Justin Yifu Lin would repeatedly use China-Africa relations as an example of 'win-win' and 'South-South' economic cooperation, arguing that such economic linkages could serve as an effective method for inducing structural transformation in low-income countries.[32] This account was made plausible by clearly observable increases in

28 Sheridan 2022.

29 Ibid.

30 Irene Yuan Sun, Kartik Jayaram and Omid Kassiri June 2017 'Dance of the lions and dragons: How are Africa and China engaging, and how will the partnership evolve', *McKinsey & Company*. https://www.mckinsey.com/featured-insights/middle-east-and-africa/the-closest-look-yet-at-chinese-economic-engagement-in-africa

31 Sun 2017.

32 Lin and Wang 2017.

Source: World Bank (*NY.GDP.PCAP.KD*)

FIGURE 28 GDP per capita, Sub-Saharan Africa 1960–2023

income linked to rising commodities prices and rapid inflows of capital. Both of these, however, were merely aftereffects of the Great Recession, the latter driven by the financial stimulus and ensuing building boom in China and the former by the historically low interest rates that followed the crisis.

Local governments throughout the continent also contributed to the narrative, in some cases attempting to construct developmental states both inspired by those in Asia and actively seeking Asian investment. Especially in Sub-Saharan Africa, these visions then seemed to be confirmed in rising per capita incomes (see Figure 28). Ultimately, though, this increase was simply a shadow of rising commodities prices. The most strategic of these developmental states had sought to mobilise these temporarily lucrative terms of trade to shift their economic base away from raw materials. But the exact strategy differed drastically between countries. In Rwanda, for example, the administration of Paul Kagame (2000–present) modelled itself on Singapore given that the latter is also a small one-party state wedged within a large, dynamic region.[33] The most widely recognised example, however, is Ethiopia, which rolled out a series of state-led developmental reforms after the end of

33 Caryl, Christian 2 April 2015 'Africa's Singapore Dream', *Foreign Policy*. https://foreignpolicy.com/2015/04/02/africas-singapore-dream-rwanda-kagame-lee-kuan-yew/

the civil war in the early 1990s, with the goal (not achieved) of turning Ethiopia into a middle-income country by 2023.

After an initial focus on Ethiopia's agricultural sector, reforms targeting industry grew more prominent after the Great Recession. The Growth and Transformation Plans (GTP I covering 2011–15, GTP II covering 2016–20) emphasised 'providing security of tenure to investors and residents' and prioritised 'developing light industries such as floriculture, textiles, leather goods, and food and beverages in export processing zones (industrial parks near urban centres)' while also shifting away from earlier policies' focus on rural smallholders and toward the development of 'large-scale commercial agriculture in commodities such as sugar.'[34] Figures such as Arkebe Oqubay – the former mayor of Addis Ababa, board member of both the Ethiopian Railway Corporation and Ethiopian Airlines, and longtime Senior Minister and Special Advisor to the Prime Minister – attempted to both refine the institutional machinery of the developmental state and market the Ethiopian experiment to global investors.[35]

But most African governments were not in a position to lead developmental drives of similar intensity and instead used revenue from the commodities boom to secure loans that, though ostensibly earmarked for infrastructure, were also lucrative sources of pilferage for domestic elites. In Kenya, for example, the administration of Mwai Kibaki (2003–13) initiated a massive, debt-financed infrastructural buildout that seemed, on the surface, to be inspired by the example of other developmental states. Though weighed down by graft, the commodities boom nonetheless ensured that the Kibaki-era projects were 'accompanied by broad-based economic growth and an increase in revenue collection. Therefore, even as deficits rose, the proportion of revenues that went to debt service and the Debt/GDP ratio remained fairly flat.'[36] When Uhuru Kenyatta was elected in 2013, the commodities boom was coming to a close. Nonetheless, Kenyatta accelerated borrowing and followed the Ethiopian example by adding in vague language about increasing domestic manufacturing capacity, even while he 'failed to craft a coherent industrial policy to back

34 Zeleke 2020. p. 168.

35 Arkebe's doctoral dissertation (at the School of Oriental and African Studies) was subsequently turned into a book that became probably the most widely cited example of a policy advocating for the formation of Asian-inspired developmental states in Africa: Oqubay 2015.

36 Opalo, Ken 12 July 2024 'Kenyan Protests, Part Two: How not to clean up a fiscal mess', *An Africanist Perspective*. https://www.africanistperspective.com/p/kenyan-protests-part-two-the-wages

up his infrastructure spending.'[37] The result was simply more debt: 'Kenyatta inherited a debt stock of about $22b and added a staggering $51b to it.'[38] Meanwhile, declining commodities prices were already increasing the debt burden and Kenyatta's backroom dealing then worsened the problem by relaxing tax collection and increasing the share of higher-interest loans from commercial lenders. The result was that, 'when he left office [in 2022] there were still more than 400 stalled projects that had cumulatively gobbled up billions of shillings.'[39] This then opened the door for Kenyatta's ouster by William Ruto, whose campaign appealed to populist sentiment, and then, despite these populist promises, attempted to force through an IMF-designed recovery program that would raise taxes and impose new austerity measures on the poor, triggering massive protests in 2024.

Tanzania represented something like a middle-ground between the Ethiopian and Kenyan extremes: an elite-led government nominally unified in a single ruling party, within which factions operated in a more or less rentier fashion, profiting from money skimmed off IMF-led privatisation campaigns, foreign aid, and extractive investment but also overseeing legitimate developmental programs that ranged from roadbuilding to the extension of commerce and credit to rural smallholders. Many of these developmental campaigns also recognised the contributions of informal workers in sectors such as mining and trade and attempted to reorient public infrastructure to accommodate this reality, rather than simply forcing formalisation from the top-down – though efforts were made in this direction as well. Meanwhile, these developmental drives also saw the Tanzanian government establish a series of export-processing zones loosely modelled on the East Asian precedent, though not nearly as successful. The most established of these is the Benjamin William Mkapa SEZ (named after the president who had led the privatisation drive in the 1990s) founded in Dar es Salaam in the mid-2000s and host to the country's largest exporters of manufactured goods.

By the 2010s, the image of Chinese financing had become increasingly central to the legitimacy of these developmental projects. President Jakaya Kikwete signed several prominent deals with Chinese investors throughout his administration (2005–15), especially during his second term. On a single trip to Beijing in 2014, he finalised five such deals, allegedly worth more than 1.7 billion USD. These included the construction of a satellite city outside Dar es Salaam, a new

37 Ibid.
38 Ibid.
39 Ibid.

financial hub downtown, and a large rural electrification project.[40] Much of the media coverage for such investments compared them favourably to the old cooperative development projects between socialist China and Tanzania in the *Ujamaa* era, such as the Uhuru/TAZARA railway or the Urafiki textile factory.[41] As if to emphasise the theme, Kikwete's final term in office was capped by the completion of the Mtwara-Dar es Salaam Natural Gas Pipeline in 2015, built by a subsidiary of the China National Petroleum Company with a concessional loan from the Exim Bank of China and funding from the Tanzania Petroleum Development Corporation, one of the few parastatals from the *Ujamaa* era that was not subsequently privatised. Though the construction of the pipeline sparked riots by villagers on the Mtwara end in 2013, it was nonetheless a popular symbol of development in Dar es Salaam, where it helped to stabilise an overstrained power supply.[42]

Ultimately, though, the majority of the announced projects never materialised. By far the most spectacular (and symbolic) of these failures was the new deepwater port and affiliated free trade zone to be built with financing from China and Oman in historic Bagamoyo, an hour or so north of Dar es Salaam. Set to be the largest port in all of Africa, the project was not only promoted by Tanzanian politicians but also frequently listed as one of the flagship investments in China's '21st Century Maritime Silk Road' project, the seaborne half of the larger Belt and Road Initiative. Over the course of the decade, however, the megaport proved to be little more than a mirage. Talks stalled, were scrapped, and then revived in new forms. By the mid-2020s, more than a decade after the project was announced, no ground had yet been broken. The port simply does not exist.

Meanwhile, the messy and much-less spectacular reality of growing Asia-Africa linkages was playing out in the old, overburdened Port of Dar es Salaam, where Tanzania Container Terminal Services – a joint venture with Hutchinson Port Holding, a subsidiary of Hong Kong-based and Cayman-registered firm CK Hutchinson Holdings – worked alongside the state-owned Tanzania Port Authority to conduct a series of bricolage build-outs to increase short-term

40 Reuters Staff 24 October 2014 'Tanzania signs investment deals with China worth over 1.7 bln', *Reuters*. https://www.reuters.com/article/markets/commodities/tanzania-signs-17-bln-energy-construction-deals-with-china-idUSL5N0IE30U/

41 By the early 2020s, TAZARA was still operational as a passenger service, though not often used for its intended purpose of transiting copper out of Zambia. But the Urafiki plant was converted to a private joint venture with a Chinese garment firm from Wenzhou in the 1990s, after which it struggled to maintain profitability, finally shutting down in 2018.

42 Reed, Ed 3 February 2020 'Mnazi Bay to hold steady in 2020', *Energy Voice*. https://www.energyvoice.com/oilandgas/africa/221853/mnazi-bay-to-hold-steady-in-2020/

capacity in the face of rapidly increasing demand.[43] The main contract for the expansion was awarded to the China Harbour Engineering Company and funded by a World Bank loan, with affiliated projects financed by the UK Department for International Development and TradeMark East Africa.[44] In 2023, the Port Authority then licensed a 30-year lease of several of the largest terminals at the Port of Dar es Salaam to UAE conglomerate DP World, which committed to a further expansion as part of the firm's strategy to pour three billion USD into port infrastructure in Africa by 2029 – a plan intended, in part, to secure the UAE's central role in the export of critical minerals from the continent.[45] In trade and investment alike, then, growing Chinese influence was both exaggerated and remained inset within a more diverse faction of ascendant Asian powers operating in global production hierarchies still firmly oriented around the market power of the world's wealthiest countries.

The Kikwete administration also announced a series of real estate projects of unprecedented size and scope. Most were high-end developments not at all geared toward the reality of the city's peri-urban agglomeration of informal settlements. The largest of these was the Kigamboni New City, a proposed greenfield project located in the more sparsely populated peninsula across the water from Dar's central business district. The idea for the project allegedly 'came from the president himself' and was led by 'a new central government body – the Kigamboni development agency' created specifically to oversee it. In mockups of the project, huge Asian-style apartment towers capable of housing thousands of people were pictured rising from the sandy swamp. In keeping with real estate marketing trends, the entire project was branded a 'smart city.'[46]

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43 As if to emphasise the central, structuring role played by the old colonial powers in the global financial networks that often provide the capital for such projects, CK Hutchinson Holdings was formerly Hutchinson Whampoa, formed from the incorporation of two British firms in Hong Kong in 1977, when the island was still a colony of the UK and only decade or so after Tanzania itself had gained independence from Britain.

44 Hönke and Cuesta-Fernandez 2017; Reuters Staff 10 June 2017 'Tanzania signs $154 million contract with Chinese firm to expand main port', *Reuters*. https://www.reuters.com/article/us-tanzania-ports/tanzania-signs-154-million-contract-with-chinese-firm-to-expand-main-port-idUSKBN1910RU

45 The Citizen Reporter 24 March 2024 'TPA clears workers to join DP World as port management changes', *The Citizen*. https://www.theCitizen.co.tz/tanzania/news/national/tpa-clears-workers-to-join-dp-world-as-port-management-changes-4566328; Zabasajja, Jennifer and Burkhardt, Paul 14 June 2024 'DP World Plans $3 Billion African Ports Investment by 2029', *Bloomberg*. https://www.bloomberg.com/news/articles/2024-06-13/dp-world-plans-3-billion-investment-in-african-ports-by-2029

46 Lindell, Ilda, Norstrom, Jennifer, and Byerley, Jennifer 2016 'New City Visions and the

Meanwhile, it was only the largest of several satellite settlements proposed in the same years, including Dege Eko Village in the far southwestern corner of Dar, and Kawe 711 in the city's north. All were intended as modern suburban commuter cities, modelled on greenfield city projects in East Asia (namely those of Malaysia and Hong Kong).

Like the non-existent port in Bagamoyo, the Kigamboni project floundered from the start, unable to find any workable means to deal with the displacement of the 97,000 existing residents in the huge area required for development, despite securing funding from the National Social Security Fund in addition to the deal Kikwete had signed with China.[47] Nonetheless, it did result in the construction of over 1,000 houses in the area, left in various stages of construction. The other projects also cleared land and began to build. However, each of these projects ultimately collapsed amid the corruption scandals that plagued the country in the 2015 elections. The incoming Magafuli administration led an anti-corruption drive systematically targeting such projects, centralised planning authority for urban development, and cancelled many of the investment projects agreed to by Kikwete and numerous local officials.[48] Some were then revived in Hassan's administration (2021 onward) at reduced scales, such as Kawe 711. But the largest projects such as Kigamboni New City and Dege Eko Village were simply abandoned.

Nonetheless, beneath the mirage of hyperbolic megaprojects, a wave of smaller and more informal infrastructural investments, often funded in part by Chinese capital or constructed with the involvement of Chinese subcontractors, had already reshaped the built environment in significant ways. Among the most visible of these were bridge, road, and housing projects, the former two distributed throughout the country and the latter concentrated in Dar es Salaam. These included the Tanzanite Bridge, mentioned above, and the Nyerere Bridge in the southern stretch of Dar es Salaam, both built by Chinese contractors and financed through a complex chain of aid and sovereign debt. But large and small bridge projects were scattered all over the country, with one of the biggest being the Kigongo-Busisi Bridge in Mwanza. In the case of roads, financing was either sourced through the Tanzanian National Roads Agency (TANROADS) or from multilateral institutions like the African Development Bank or the World Bank's International Development Association. Altogether, 10 large TANROADS projects resulting in a total of 1,069.6 km of upgraded or

Politics of Redevelopment in Dar es Salaam', *Nordiska Afrika Institutet*, Uppsala. https://www.diva-portal.org/smash/get/diva2:1070397/FULLTEXT01.pdf

47 Ibid.

48 Rosen 2019.

rehabilitated road were completed between 2000 and 2016. Of these, eight were built by Chinese contractors (the remaining two were awarded to firms from Kuwait and Japan). And, of the 19 projects financed by multilateral aid agencies, Chinese firms won the construction contracts for 13.[49] Smaller road rehabilitation projects were also often contracted to regional firms, such as Kenyan company Estim Construction, which built a number of projects in and around Dar es Salaam in the same years.[50]

The building boom also drove a rapid increase in real estate prices, attracting both Chinese construction contractors facing a saturated home market and Chinese conglomerates flush with low-interest loans. In the five years between 2009 and 2014, the value of real estate in Tanzania almost doubled, composing just under four percent of GDP by the middle of the decade.[51] Though not high by global standards (for reference: in China, real estate peaked somewhere around 30 percent of GDP), this sort of urban boom was nonetheless strange for a low-income country with a minimal industrial base. Similarly, although the majority of the Tanzanian population lived outside Dar es Salaam – or any other city, as roughly two thirds of the population resided in rural areas in those same years – the bulk of this new real estate development was concentrated in the city's central business district, where roughly 500 million USD was invested in five key projects.[52] These included both smaller-scale towers such as Uhuru Heights and major skyscrapers such as the Mwalimu Nyerere Foundation Square, both built by CRJE (East Africa) Ltd., a subsidiary of the China Railway Construction Engineering Group.[53] Tracing its history back to the construction of TAZARA in the *Ujamaa* era, CRJE has built over 30 major projects in the country and, as of the 2010s, was the largest construction company in Tanzania.[54]

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49 Flores, Isabel 2017 'Dissecting Chinese Involvement in Road Construction Projects in Tanzania', *Honors Thesis University of Iowa*. https://iro.uiowa.edu/esploro/outputs/undergraduate/Dissecting-Chinese-Involvement-in-Road-Construction/9984109965702771

50 For a list, see: Estim 2022 'Projects', *Estim Construction*. https://estimconstruction.co.tz/projects/

51 The Citizen 10 January 2018 'Real estate business has come a long way', *The Citizen*. https://www.theCitizen.co.tz/tanzania/news/business/tanzania-works/real-estate-business-has-come-a-long-way-2619352

52 The Citizen 8 August 2014 'Dar's skyscraper boom: Watcher's see signs of prosperity', *The Citizen*. https://www.thecitizen.co.tz/tanzania/news/national/dar-s-skyscraper-boom-watchers-see-signs-of-prosperity-2513686

53 The Citizen 2 November 2020 'CRJE Marks 50 years of excellence in Tanzania and East Africa', The Citizen Supplement. https://www.theCitizen.co.tz/tanzania/supplement/crje-marks-50-years-of-excellence-in-tanzania-and-east-africa-2679072

54 The Citizen 15 October 2019 'It's Mwalimu Nyerere who brought CRJE Company in Tan-

But, just as in the infrastructural sector, the chain of finance and sub-contracting was often more complex than media reports made it out to be. The two towers composing the Mwalimu Nyerere Foundation Square project were constructed on a Build Operate and Transfer basis between CRJE and the Tanzanian government, with financing from both CRJE and the International Finance Corporation of the World Bank.[55] Meanwhile, many projects saw minimal Chinese involvement, such as the PSPF Towers, the PPF Tower, the TPA Tower and the CRDB Headquarters, all of which were contracted to Kenyan firm Estim Construction, often working under Omani firm Al Hatmy Engineering and subcontracting portions of the work to both Chinese construction contractors and specialised suppliers such as UK electrical and lighting wholesaler Tan Sales.

But the boom was also plagued by poor planning and open corruption, leading to a relatively large share of real estate projects stalling out in the middle of construction. Many had been proposed and often funded by public agencies such as the National Housing Corporation and the National Social Security Foundation. Some had been contracted out to Chinese firms, but just as many were awarded to other players such as Estim.[56] By 2015, a significant number of these projects were already showing signs of poor financial management, with billions of shillings in arrears from unpaid land rents and construction already beginning to slow due to lack of funding.[57] Similarly, local media had begun to raise concerns about the outsize scale of the projects relative to demand for luxury condos and the capacity of the country's electrical grid, as well as the quality of construction. For example, investigations in 2015 found that 'due to lack of knowledge, negligence and corruption, some of the buildings are constructed below standards and several people have already lost their lives due to building collapses.'[58] Reports such as this helped drive popular support for Magufuli's campaign and his subsequent anti-corruption drive. The result was a

zania', *The Citizen*. https://www.thecitizen.co.tz/tanzania/supplement/it-s-mwalimu-nyerere-who-brought-crje-company-in-tanzania-2694672

55 IFC 4 February 2010 'The Mwalimu Nyerere Foundation House', *International Finance Corporation*. https://disclosures.ifc.org/project-detail/SPI/29058/the-mwalimu-nyerere-foundation-house

56 Tairo, Apolinari 16 December 2019 'NSSF Tanzania plans to rent and sell its property', *The East African*. https://www.theeastafrican.co.ke/tea/business-tech/nssf-tanzania-plans-to-rent-and-sell-its-property-1433008

57 The Citizen 29 June 2019 'NHC projects to face further scrutiny', *The Citizen*. https://www.thecitizen.co.tz/tanzania/news/national/-nhc-projects-to-face-further-scrutiny-2685616

58 Author's translation. From: Nuzulack Dausen, Goodluck Eliona, and Florence Majani 23 April 2015 'Maghorofa jana jingine', *Mwananchi*. https://www.mwananchi.co.tz/mw/habari/kitaifa/maghorofa-janga-jingine-2782654

systematic crackdown on the sector targeting luxury developments. By the turn of the decade, Kigamboni New City had been scrapped entirely, while Dege Eko Village, Kawe 711 and similar projects sat in limbo, their bare, empty concrete facades looming over the coastal plain. Projects such as these became frequent references in interviews and random conversations about the state of the country. On trips north of the city, almost every taxi driver would point to the concrete frame of Kawe 711 mouldering on a prime strip of beach right near a major thoroughfare, praising the crackdown on corruption but bemoaning the eyesore.

Of the construction that was actually completed in these years, the various AVIC projects erected throughout the city serve as representative examples. These included an under-inhabited residential tower down the street from my apartment in Upanga as well as an upscale apartment complex in Oyster Bay. But the most symbolic case was an entire gated community called AVIC Town in Kigamboni, near the site of the failed New City. Beginning in the late 2000s and early 2010s, the government began proposing plans to seize the land of residents in Somangila ward for various developmental projects. The first of these was an oil refinery, stopped when local villagers banded together to petition the central government's environmental agency. Shortly thereafter, regional authorities announced plans to instead build low-cost housing for retired military officers and other civil servants. Beginning in 2012, land was appropriated, houses were razed, and over 200 villagers were violently evicted.

But the announced housing project never materialised. Instead, the regional commissioner secured funding from AVIC to build an upmarket housing development on the plot, with standalone luxury villas surrounded by a barbed wire fence. Complete with a water tower, high-capacity backup generator, and 24–7 independent security service, the entire project was seemingly modelled on the militarised exurbs that had begun to arise in South Africa in the same years.[59] After the anti-corruption drive, the real estate market cooled and it became clear that supply far exceeded demand – especially within upscale markets that had little basis in reality to begin with. Though developers like AVIC blamed the new administration's cost-cutting policies and regulatory controls for reducing incomes, the reality was simply that most of the new development had been a speculative endeavour, overbuilding luxury properties and building barely any forms of housing that were even remotely accessible for ordinary Tanzanians.

59 The Citizen 7 April 2015 'How firm left Kigamboni people traumatised', *The Citizen*. https://www.thecitizen.co.tz/tanzania/news/national/how-firm-left-kigamboni-people-traumatised-2524450

3 Islands of Industry

On the one hand, the massive building boom in cities like Dar es Salaam has clearly been speculative in nature, with construction far outpacing actual demand and capital chasing after real estate values that, though somewhat self-reinforcing, ultimately hinge on questionable predictions that the region is set to become a major industrial centre at some point in the near future. On the other hand, beneath the fog of fictitious capital was a more subtle flood that had carved out real changes in both the urban territory of the city and in the sociotechnical landscape of East Africa more generally, spurring the largest wave of rural-to-urban migration the country (and greater region) had seen since the industrialisation programs of the early postcolonial period. This rapid urbanisation then reinforced the mythos on which the value of formal real estate projects was based. But the image of modernisation projected by luxury condominiums diverged from the reality, which was visible not in gleaming "new cities" on the horizon but instead in the rapid growth of ring after ring of informal settlements radiating out from the central city along all the major thoroughfares.

Similarly, with so many new migrants and such a low base of waged employment, the informal economic activities that had long formed the *de facto* economic base of the city only became more necessary. Digital technologies facilitated this expansion: taxis, *pikipiki* (motorbike) and *bajaji* (auto-rickshaw) drivers now made use of ride-hailing platforms like Uber, small roadside stands sold additional phone data in the form of lottery-style scratcher tickets, and even traditionally cash-dependent trade in agricultural goods and classic informal economy commodities like *mitumba* – second-hand clothes donated from wealthy countries, imports of which devastated the African textile industry – had become increasingly integrated with digital microfinance monopolies like M-PESA, administered by UK firm Vodafone and Kenya's Safaricom.

Some of this excess labour was also sopped up by the construction sector itself, including both better-paid jobs on large-scale projects like bridges or skyscrapers and the various types of handicraft building and maintenance work that goes into keeping shantytowns habitable. In fact, the latter also constitutes what may be the country's largest manufacturing line, in terms of employment: a substantial wood products sector dominated by small and micro-scale enterprises. This intricate interweaving of the formal and informal is immediately visible in the spatial layout of the city's industrial zones, where corridors and clusters of larger-scale manufacturing and warehousing facilities – identifiable on satellite images by their distinctive blue (sometimes ruddy brown, greenish or grey) sheet metal roofing – are surrounded by low-lying *uswahilini*, the

former often separated from the latter by a buffer of informal industrial areas hosting small workshops, food stalls, and petty trader stands.

Infrastructure in these industrial zones has a similar character. Though the major zones stretch along the city's largest paved multi-lane highways, deeper in the cluster facilities were often linked by potholed dirt roads and narrow alleyways prone to severe flooding (see Photo 13). While surveying another district near the TAZARA terminus, one of the wooden poles holding up the power lines feeding into the nearby factories had come loose after a storm. Dislodging itself from the mud, the pole was caught and held up by the tension of the lines themselves at a 45-degree angle, preventing cargo trucks from unloading at a nearby yard. Unperturbed, workers biked and walked beneath the livewires (Photo 14). These failures of formal infrastructure then became another outlet for informal marketisation. While traversing one such district in Ubungo, recent rains had left a permanent pond at a major intersection. Otherwise impassable, local residents had built a 'bridge' of scattered stone and wood planking spanning maybe fifty yards, charging pedestrians a toll to cross.

But the same basic phenomenon was also visible in gendered labour hierarchies within both the households of the *uswahilni* and the informal markets intercutting formal industrial zones, where women represent a disproportionate share of the workforce. Spanning a wide range of reproductive occupations – laundry services, food preparation, cleaning, urban agriculture, garment repair and production, sex work, childcare, etc. – and encompassing both paid and unpaid work, these activities constitute 'a sphere of non-labour or extra-necessary labour which envelops the process of transforming dead labour, that is commodities purchased with the wage, into the living labour capacity found on the market.'[60] The increasing role of market mediation within this sphere is thus a major contributor to the 'feminization of labour' at the global scale. In some cases, this mediation is direct, as in the examples of '*Mama Lishe*,' women who cook bulk meals in large stainless-steel pots that they then cart out to the streetside to sell in portions to unmarried men.[61] At larger scales, these vendors will even 'employ several assistants, responsible for cooking, serving, cleaning, security, and other tasks.'[62] Similarly, sex work is a major form of informal employment for young women without families or who had been thrown out of their homes after a divorce.[63]

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60 Gonzalez and Neaton 2013, p. 62.

61 Milanzi 2011; Tillerman 2012.

62 Mhando, Nandera Ernest and Mramba, Nasibu Rajabu 2021 'Improving young women's working conditions in Tanzania's urban food vending sector', *WIDER Working Paper*, 2021/157.

63 Matheka, James K., Elizabeth Shayo and Annabel Erulkar 2020 'Domestic work, sexual abuse, and exploitation in Tanzania', *Population Council Brief*.

PHOTO 13 An industrial district near the airport
AUTHOR, 2020

PHOTO 14 Workers passing under a fallen electrical line
AUTHOR, 2020

But market mediation was just as often indirect, as in the example of young women from poorer backgrounds who are adopted into slightly wealthier households, where they live as domestic workers in exchange for room, board, and sometimes pay.[64] Such women are colloquially referred to as *dada*, or sister, indicating how their position within the family is 'ambiguous and often confused with kinship or distant kinship.'[65] Though the unwaged character of much of this work might make it appear to operate outside the market entirely, these occupations are more accurately characterized as indirect methods for reducing labour costs throughout the economy as a whole. Reproduction does not occur in some primeval sphere beneath or beyond capitalist society but is fully subsumed within it and is therefore subject to similar forms of economic discipline. Just as in the factory districts of South China, for example, young women enrolled as household servants 'are often preferred by employers because they are thought to be easier to control and manipulate, demand

64 Mtei and Manzagalila 2020.
65 Cirillo 2023.

little or no pay, and lack awareness of their rights.' For much the same reason, such workers are often subject to sexual abuse on the job and 'domestic work is a feeder profession for sex work,' establishing a continuum between waged and unwaged forms of gendered work.[66]

Industrialisation in the city is therefore defined by islands and archipelagos of larger, more formal firms floating in a sea of smaller, less formal small and micro-scale enterprises, many of which are only indirectly mediated by the market. Meanwhile, this entire complex is only sustained through explicitly gendered divisions of labour that link paid work in the factory to small businesses on the periphery and unpaid labour in the back of the house. Many of these divides also manifest within the built environment. Larger firms tend to operate in enclosed spaces within which production sites and storage yards are literally walled off from their surroundings. In some cases, such as the two major export processing zones in the city or on various large-scale warehousing sites near the port, multiple self-enclosed firms are further sequestered within a larger walled compound. The biggest business parks, export-processing zones and power facilities are located alongside the paved thoroughfares and often have their own infrastructural and security services. By contrast, informal production clusters tend to be less self-contained, with manufacturing activity taking place in tarp-covered clearings or in sheet-metal sheds or garages that often have only three walls, spilling out into mixed-use yards, onto the sidewalk, or even into the street. Such activity is difficult to clearly distinguish from service work, however, since many workshops producing new goods also serve as repair centres, showrooms, storerooms, and even miniature hardware stores.

Murphy describes the basic character of work in these industries, among which the production of furniture and other wood products is likely most representative:

> Production occurs primarily in small workshops that are typically in poor physical condition and in which most of the work is done by hand. SMMEs often get some assistance from power tools such as sanders, planers, and jigsaws, and typically acquire the services of larger cutting or lathing machines from nearby workshops who earn extra income by renting machine time. Wood and hardware supplies are acquired from local shops and, for most, wood is purchased from lumber suppliers who collocate in wood-working markets and clusters. Marketing and sales activities occur

66 Matheka et al. 2020, p. 1.

> through face-to-face encounters as customers walk into the showroom and workshop areas to inquire about prices and/or place orders for custom furniture.[67]

The formal/informal divide is also troubled by the fact that the goods produced in such workshops are often made to mimic those seen in more formal shops or in the many catalogues provided by Chinese wholesalers, though the resulting style is often quite distinct.

Since these informal industrial territories both encircle the spaces of more formal production and seep into the interstices between factory compounds, the conceptually indistinct categorisation of formal/informal takes on something of a vernacular character. Respondents tend to refer to the concrete buildings and enclosed yards of more formal manufacturing or warehousing sites as either *viwanda* ('factories,' sg. *kiwanda*) or *ghala* (warehouses), while informal clusters are most often referred to as either *karakana* (workshops/garages), *maduka* (shops, sg. *duka*) or simply as *mafundi* (sg. *fundi*), a term that refers to the artisans themselves and which covers a wide range of activities from textiles to carpentry. Similar, though slightly less clear, distinctions exist when talking about both work and workers in such industries. While the terms *kufanya kazi* (to work) and *wafanyakazi* (workers, sg. *mfanyakazi*) are more inclusive and can be loosely applied to both employees at various factories and those directly engaged in handicraft production, the category of *mafundi* is usually only applied to the latter, with their work frequently described as *kazi ya mikono* (handicrafts, lit. 'work of the hands'). Regardless of its local character, however, this handicraft work is shaped by global trade and often depends on imported inputs. For example, seamstresses regularly modify clothing bought from *mitumba* markets, food vendors purchase bulk rice grown in Pakistan, and furniture makers might use imported fibreboard to emulate Chinese sofas. But, unlike the production networks of similarly informal SMEs in Taiwan, Tanzanian SMME production is rarely export-oriented. Maybe more importantly, the privatisation drive of the 1990s also left behind few upstream conglomerates capable of playing the sort of role that state-owned companies once did in Taiwan or corporatised group companies in mainland China.

Even among larger-scale factories, export production remains limited. One of the biggest export firms in the country is Tooku Garments, which operates out of the Benjamin Mkapa EPZ and produces jeans for global lead brands such as Levi's. As Urafiki downsized throughout the 2010s and finally shut down,

67 Murphy 2013, p. 1761.

PHOTO 15 An informal carpentry workshop in the industrial district near the Ubungo Power Plant
AUTHOR, 2020

Tooku was expanding its workforce from just over 1,500 employees in the early years after its founding (in early 2012) to somewhere between 3,000–4,000 by the end of the decade, making it not only the country's largest garment factory but also one of the biggest manufacturing employers.[68] Tooku's history is also telling. The company is owned by JDU Manufacturing, a garment producer founded in Changzhou, Jiangsu in 2005, at the heyday of China's own export boom. Operating within a sector defined by cutthroat price wars, JDU became an early overseas investor, opening a factory (in 2007) and R&D centre (in 2009) in Cambodia and a factory in Myanmar in 2012, the same year that production began at its Tanzanian subsidiary. Cost cutting in the garment sector was so extreme, however, that even relatively competitive mainland firms with overseas facilities in cheaper locations were often swallowed up by the ever-growing contract manufacturer monopolies. This is precisely what happened to JDU, which was acquired by Taiwanese firm Roo Hsing in 2017. Thus, by the end of

68 Li Jing 10 August 2017 'Feature: Chinese Firms Creates Jobs, Improves Skills for Tanzanian Locals', *Xinhua*. http://www.chinafrica.cn/Africa/201708/t20170811_800102259.html

the decade, the largest single 'Chinese' employer within the industrial sector in Tanzania was a mainland firm that had been acquired by an oligopolistic Taiwanese contract manufacturer.

Many other major manufacturers were owned by domestic conglomerates such as Azam (a subsidiary of family-run Bakhresa Group, the largest company in Tanzania) and, of those reliant on FDI, investment often came from historic links to India and the Arab world or from nearer clusters of capital in places like Kenya or South Africa. Production at such facilities usually served either domestic demand or the larger East African market rather than producing exports to either the wealthy countries or to growing middle-rung consumer markets in places like China and the Gulf States. Crucially, few of these employers seem to have had many forward or backward linkages with the informal SMME sector.[69] Meanwhile, completely inverting a media narrative that focused almost exclusively on 'state-owned' extractive firms and construction and engineering contractors, most Chinese companies that had made direct investments in Tanzanian industry were relatively small-scale private companies operating manufacturing and warehousing facilities in and around Dar es Salaam. This is also representative of the norm across Africa as a whole, as confirmed in a larger survey conducted by McKinsey in the mid-2010s, which found that 'around 90 percent of the 10,000 or so Chinese businesses in Africa are privately owned' and that these companies reflect a diverse set of interests linking back to their home firms as well as different government agencies and financial institutions, rather than operating as a single monolithic bloc. Altogether, the survey estimated that 'Chinese firms already handle 12 percent of Africa's industrial production,' though this number likely decreased over the remainder of the decade.[70]

Within the main industrial zones of Dar es Salaam, my own survey (the summary is depicted in Table 2) found that the most common sector for Chinese firms was building materials, including the production of ceramic tiles and concrete, the warehousing of general construction goods, the manufacture of glass and associated steel frames, and, most prominently, the manufacture (i.e., shaping), warehousing, and sale of sheet metal (*mabati*), mostly for roofing. With anywhere from one to 500 workers, the largest of the sheet metal facilit-

69 Tooku, for example, did not seem to outsource piecework to household-based *mafundi*, instead conducting production largely within its large factory in the EPZ. There were, however, many cases of workers trained by Tooku leaving to start their own businesses. Stronger backward-linkages were visible in the case of Chinese firms in the agro-processing sector in Shinyanga, documented in: Xia 2019a.

70 Sun et al. 2017, pp. 28–9.

TABLE 2 Chinese firms by product, Dar es Salaam, 2020

Firms	Product	Sub-sector
5	Sheet Metal	Manufacturing
3	Bags	Manufacturing
3	Used Clothes	Warehousing
2	Construction Materials	Warehousing
2	Ceramic Tiles	Warehousing
1	Concrete	Manufacturing
1	Construction Vehicles	Warehousing
1	Electrical Transformers	Manufacturing
1	Glass and Steel Frames	Manufacturing
1	Mattresses, Sofas, and Compressed Gas Tanks	Manufacturing
1	Metal Door Frames	Warehousing
1	Metal Gas Pipes	Manufacturing
1	Motorcycles (Reassembly)	Manufacturing
1	Recycled Plastic Materials	Manufacturing
1	Tires	Manufacturing
1	Trucks	Warehousing
1	Hardware Goods	Warehousing

FIELD SURVEY BY AUTHOR, JAN–FEB 2020

ies were also the largest Chinese employers in the manufacturing sector aside from Tooku Garments.[71] Important subsidiary sectors included the production of cheap bags (*mifuko*) from recycled plastics and dedicated plants for refining plastic trash into recycled pellets – though, in both cases, respondents and earlier surveys confirmed that these had been more prominent activities in the mid-2010s and had since suffered from restrictions imposed under the Magufuli administration. Almost all of these activities were capital-light and required minimal investment. Many were essentially just warehousing and wholesale facilities. Those involved in manufacturing tended to focus on simple products that could be produced with little skill from easily available materi-

71 Though underrepresented within the city, the manufacture of ceramic tiles likely employs as many workers as the sheet metal firms, given that Chinese firm Keda also operates a ceramic tile factory East of Dar es Salaam in Pwani, near Chalinze, and Twyford (a joint venture between Keda and another Chinese firm, Sunda International) was supposedly building another ceramic tile factory in Pwani according to Xia 2019a.

als. For example, a motorbike factory in the city's northernmost industrial zone simply ordered disassembled bikes from China and then reassembled them onsite. Often, product lines seemed almost improvised, as in a factory ('Ocean Kiss') that specialised in the production of mattresses and oxygen tanks.

Nonetheless, a few firms were more capital-intensive, and a small handful even operated in relatively advanced product lines. For example, during my own survey, I interviewed workers who had been sent from their home factory in Nanyang, Henan, to open a production line for electrical transformers. When I visited the factory, they were in the process of assembling the equipment and training Tanzanian workers in its use. Having kept in touch with one of my respondents after I returned to the US during the pandemic, I was then told that he'd been sent to open a second factory near Morogoro after the first was up and running. Similarly, surveys by other researchers also identified large steel producers just outside the city's borders. These ranged from simple plants that moulded rods and sheets imported from China to more advanced facilities recycling steel scrap to produce bars and wire rods. Kiluwa Steel, located just outside Mlandizi, to the east of the city, is the most capital-intensive of the steel plants, capable of producing bars 'suitable for use in high-rise buildings.'[72] Meanwhile, Sichuan Hongda signed a deal to access coal and iron deposits in Mbeya and Njombe regions in the country's south and to run an affiliated power plant and iron refinery, but anti-corruption crackdowns in China and Tanzania stalled the deal, which was only revived in 2023.[73]

But these were the exception. Chinese firms tended to be more prominent in trade and construction, rather than manufacturing. Even these firms were nonetheless embedded in emerging regional production networks, as in the case of Transsion Holdings, a smartphone producer headquartered in Shenzhen that runs hundreds of shops throughout Tanzania under the Tecno, Infinix, and Itel brands. By focusing on the lower-margin market for feature phones in developing countries, Transsion was able to sidestep the cutthroat competition among higher-end phone producers to become the largest manufacturer of smartphones for the African market by the end of 2017. This then allowed the company to enter the top five rankings for smartphone sales worldwide in 2023.[74] Alongside their Chinese production facilities, Transsion also began

72 Xia 2019a, p. 12.

73 GEM 8 October 2023 'Mchuchuma Power Plant', *Global Energy Monitor*. https://www.gem.wiki/Mchuchuma_power_station

74 Flannery, Russell 18 October 2023 'Emerging Markets Boost Smartphone Sales at China Billionaires' Transsion', *Forbes*. https://www.forbes.com/sites/russellflannery/2023/10/18/

moving manufacturing overseas relatively early, opening a factory in Ethiopia in 2011 and plants in India, Bangladesh, and Pakistan in the latter half of the 2010s.[75] These plants then anchored the company's booming network of retail outlets in each region.

Even for formally employed urban wage workers, factory jobs were the exception, rather than the rule. Instead, working retail at a Tecno store was closer to the norm, as is visible in the breakdown of employment by sector (see Figure 29). While the majority of workers (64.3 percent in 2021) are still employed in agriculture, forestry, and fishing, this share has fallen substantially over the past three decades, dropping 20.2 percentage points since 1991 (from 84.5 percent). And, although the share employed in industry has increased over those same years (by 4.5 percentage points, from 2.7 percent to 7.2 percent), most of the relative decline in agricultural employment has been made up for by rising employment in the service sector, which increased by 15.7 percentage points, from 12.8 percent in 1991 to nearly a third (28.5 percent) of all employment by 2021. As should now be clear, much of this service work is informal, ranging from petty traders selling snacks and knick-knacks window-to-window in rush-hour traffic jams to driving the ubiquitous *dala dala* buses.

Similarly, with wages dependent on inconsistent sales or uncertain demand, many of these proletarians can only marginally be described as 'employed' in any proper sense. If the market is particularly bad, many even travel back to rural areas to see family, live off the land to whatever extent possible, and pursue other business ventures. As socialist thinker Issa Shivji argues, in the process of proletarianisation in Africa, 'capital preserves the peasant form – the form of petty commodity production – but integrates it in the web of world-wide capital circuits … In effect, therefore, labour subsidises capital by taking on the burden of reproduction.'[76] Though Shivji contrasts this with the expected norm of a peasantry rapidly destroyed to make way for proletarianisation, this presumption has always been something of a myth. Just as in early modern Europe, the nineteenth century US, and much of Asia in the latter-twentieth century, subsistence agriculture does not undercut the process of proletarianisation but instead helps to buffer it. The process is only completed at a much

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emerging-markets-boost-smartphone-sales-at-china-billionaires-transsion/?sh=2e6ddf65b37c

75 These production facilities are listed on their corporate website. The Ethiopian plant and African distribution network are described in more detail in: Dahir, Abdi Latif 30 August 2018 'A low-profile, Chinese handset maker has taken over Africa's mobile market', *Quartz*. https://qz.com/africa/1374404/chinas-transsion-dominates-africas-phone-market-with-tecno-itel

76 Shivji and Mazwi 2021.

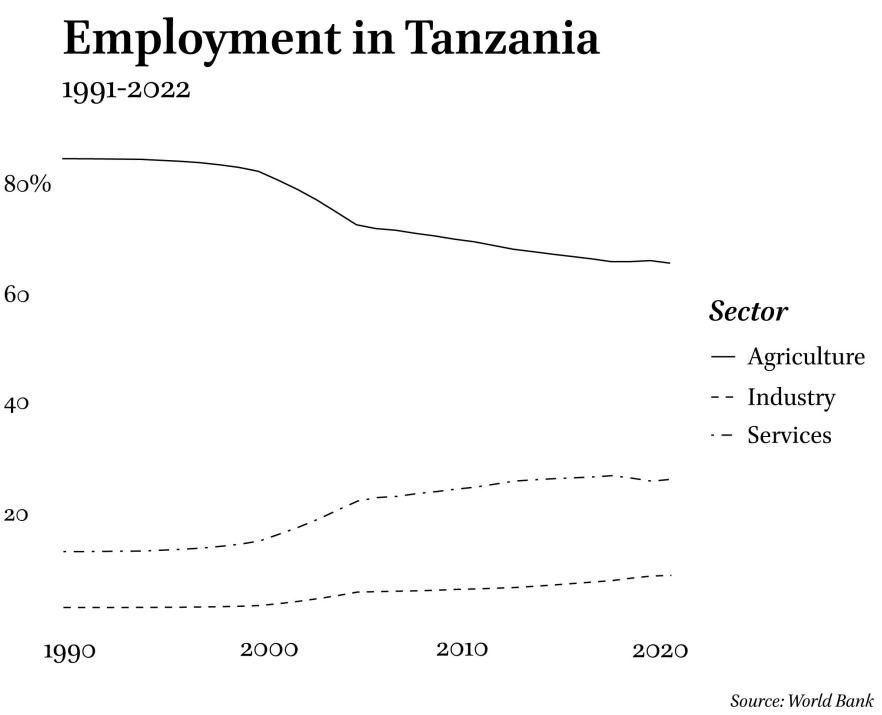

FIGURE 29 Employment in Tanzania 1991–2021

later date, when the magnet of the urban market has drained the countryside of its population and the final generations of remaining subsistence producers have died off, displaced by capitalist farmers. In other words, the condition that Shivji identifies in Africa is hardly unique but is instead a more or less typical pattern of modern enclosure.

4 The Pulse

Though data and descriptive overviews help to demonstrate the significance of informality within the local economy, the exact tenor of proletarian life is better illustrated in its singularity. One of my respondents provides a particularly encompassing example: I met Chris (his preferred name) when interviewing locals near the Mzizima Towers construction site in central Dar es Salaam. At the time, he was effectively homeless and made money trying to sell paintings to tourists – these paintings, which invariably depict Serengeti scenes and Maasai silhouettes, are a ubiquitous trade in tourist centres like Arusha and Moshi, though a bit less common in Dar es Salaam. Chris was raised on a plot of land

owned by his mother's family in a rural area on the slopes of Mount Meru just outside Arusha. I'd briefly lived in the same area a few years prior, and he was surprised to find out that I knew the name of the small towns along that same stretch of highway: Tengeru, Makumira, Usa River, Maji ya Chai, all burned into my memory in the voice of local *dala dala* conductors calling out the next stop.

The upland North was the one part of Tanzania that had seen a certain degree of settler colonialism, similar to that in the Kenyan highlands. The land had been devastated by the rinderpest epidemic in the late nineteenth century, after which the Germans were able to defeat the Arusha and Meru peoples, who were then forced to build the fort that would become the centre of modern-day Arusha. After the war, the Germans confiscated lands from the Arusha and Meru and allocated them to German settlers and a number of Afrikaner families. When the British expelled the Germans, they transferred these farms to British and Greek settlers, the latter of whom became central to the early coffee trade in the region.[77] The British also facilitated the formation of a subordinate petty-capitalist class among the Chagga, who were encouraged to use their skill in intensive mountain agriculture to grow cash crops. Many subsequently converted to Christianity, and this then allowed their children to obtain a more comprehensive English-language education.[78] Some of the same phys-

77 The role played by Greek settlers in East Africa is often ignored in larger-scale accounts of the region's history, but they served an important function mediating the colonial project. Given their lower-order position within colonial society and their status in the legal regimes of the time as non-white, their descendants would later take on divergent roles within African politics, as epitomised by the story of Dimitris Tsafendas, a mixed-race Greek Mozambican who became a Communist Party member while working as a labourer in South Africa, participated in the Sharpville demonstration in 1957, and then a decade later assassinated the South African prime minister and architect of apartheid, Hendrik Verwoerd. South Africa-based historian Antonis Chaldeos documents the history of Greek settlers throughout the continent in his blog *Greeks of Africa* and has produced the sole book-length English-language study of the history of Greek settlement in Tanzania, *The Greek Community in Tanzania*. For an overview of Chaldeos' work, see: Chaldeos, Antonis 24 December 2021 'Rethinking Greece | Antonis Chaldeos on the Greeks of Africa', *Greek News Agenda*. https://www.greeknewsagenda.gr/greeks-of-africa/

78 This history is also why the Chagga have an outsize presence within the domestic capitalist class today, ranging from petty traders to larger-scale business and bureaucratic interests. In Tanzania, this is often accounted for in mundane ethno-cultural terms, with a common refrain being that the Chagga simply 'love money' – '*Wachagga wanapenda pesa*' is the universal response when one asks why Chagga occupy these roles. But their present social role is clearly rooted in the privileged position that the Chagga occupied within the early colonial regimes (in part due to their preexisting proficiency in intensive agriculture), which then allowed them early entry into a market otherwise closed to natives. Likely the best English-language overview of this history is: Fisher 2012.

ical factors that made the location ideal for settlement by Europeans – such as cooler climate and nearby natural amenities such as Ngorongoro Crater and Mount Kilimanjaro – would later make cities like Arusha and Moshi important hubs within both the formal tourist industry and the equally lucrative industry in Christian mission trips.

Raised in this environment, Chris was a fluent English-speaker, with his language skills learned mostly in the tourist industry in and around Arusha. But he did not have a high level of formal education or any opportunity to pick up skills in trade. Like many young men in Tanzania (especially in the Arusha area) he had been a Rasta for many years.[79] But this had also put him in proximity to the drug trade, which led him into addiction. He then quit the Rasta life and went through a local Narcotics Anonymous program. When I met him, he was a few years younger than me, in his late twenties. He had come to Dar es Salaam looking for work but finding little more to do than sell the same paintings he'd sold on the street in Arusha, though with a smaller market. Most days he simply hung out with some other migrants from the north near a small stall one of them ran on the outskirts of Kariakoo selling cigarettes, sodas, and Maasai herbal cures. At night, he'd often sleep in the alleyway behind the stall.

For Chris, life was fluid, and the urban fabric was porous. Once, when I asked if I could pay him to show me the location of a Chinese factory he'd mentioned, he led me on a labyrinthine journey through the city's substructure: we wove through narrow alleyways and the courtyards of densely-packed apartment complexes bordering Kariakoo, took the *dala dala* out to a nearby industrial area and then walked on foot through the winding paths of the *uswahilini* wedged between the Benjamin Mkapa EPZ and the razorwire of the Ubungo powerplant, where small shacks perched above a serpentine river fat with rain. We then cut across a construction site near the expanding powerplant, through a neighbourhood graveyard where weather-worn tombstones crumbled under the high voltage power lines, and into a muddy field near an old rail line. By that point, I'd convinced myself that he had no clue where we were going. But then we crossed the railroad, climbed over a brush-choked hill, and slid down into what turned out to be the factory's parking lot.

When we'd finished interviewing the workers there, I realised we were not far from Morogoro road and the new rapid transit buses that ran in a straight

79 The rise of the Rastafarian movement within Tanzania is an underappreciated aspect of twentieth century pan-Africanism. Driven by an expansive repatriation movement, Rastafarian practice soon gained a relatively widespread native base, concentrated in the North but present in essentially all population centres. The history is documented in: Bedasse 2017.

shot on a dedicated expressway from the exact area of downtown where we'd started. This bus system represented the new city envisioned by planners: clean lines stretched from the financial centre to the residential complexes and industrial districts, cleared of the messy crush of mixed traffic, with *pikipiki* and *bajaaji* replaced by bright new buses that you needed a ticket to ride. But this modern city of crisp, architectural angles was simply a froth floating on the deeper city of labyrinths: twisting paths, winding rivers, bodies packed together in vibrant *dala dalas*, and each space uncontained, with restaurants spilling into the street, houses open to the air, furniture-makers working under the glare of the sun, and housewives setting mazes of brightly-coloured *kanga* out on clotheslines at the heart of it all.

Within this seeming chaos, the attitude of Chris and other residents was something like the aloof tranquillity of a body carried on the surface of a great charging river. We often stopped and chatted with people he knew. We made a detour so that he could buy what he claimed to be the best cigarettes in the city, hand-rolled using local tobacco grown by a friend of a friend near Arusha and only sold in a small shop located deep of one of an *uswahilini* that looked like it was about to slide into the flood-fattened river below. When we got there, they were out of the cigarettes, of course, because some essential person in the informal supply chain had fallen ill or possibly died. Similar stories of death would pockmark many narratives, with Chris often disappearing for weeks at a time to attend funerals or try to get medical care for friends and relatives. But often such stories were told with a shrug. Not so much hopelessness as a simple resignation to the grander flow of things. Throughout the circuitous journey through some of the largest and poorest slums in the world, Chris was wearing a bright pink shirt he'd bought from one of the *mitumba* markets, emblazoned with the slogan: 'Good Vibes Only.'

The journey also turned into an informal cultural tour, as Chris pointed out some of the best local graffiti, much of which followed the general aesthetics of a hip-hop scene marked by nostalgia for the *Ujamaa* era and well-versed in pan-African iconography. With tags referencing Nyerere and murals featuring Angela Davis, the seething substructure of the city was still steeped in the spectre of last century's socialism. But these conscious references to the living history of struggle floated atop a larger subconscious cultural current that can only be described as futurist – specifically, an indigenous futurism bubbling up organically from the proletarian neighbourhoods of African megacities such as this, rather than one imported from afar or defined by artistic standards set within a consciously pan-African diaspora. This proletarian futurism has emerged, in part, through the new forms of subsistence that define life in such places: it is digital, syncretic, fast-paced, simultaneously artisanal and indus-

trial, universal and 'traditional,' and, above all, driven forward through experiment and emulation. On the surface, the tenor of this culture was visible in the rapid-fire hustle of *pikipiki* drivers weaving through the fragmented city, petty traders selling *feki* Gucci shirts, *mafundi* eyeballing a high-fashion photograph to craft their own *uswahilini haute couture* with vibrant *vitenge* from the local market, or garage workers constructing reanimated monstrosities out of any spare parts at hand. But its deeper contours were found in the artistic impulses of a young, inventive, and digitally literate class of dispossessed urbanites able to access the flow of global culture whenever they can afford data for the day. After all, in Tanzania as a whole, nearly half the population (49 percent) was under eighteen as of the 2022 Census.

The pulse of the new proletarian futurism could be felt most clearly in the city's sonic landscape. Everywhere we went within the poor neighbourhoods, frenetic electronic music buzzed out of dark doorways, chirped out of smartphones, and rattled from small speakers affixed to bicycles. When I asked what it was, Chris simply said that it was called *singeli*, and was very popular. It was invented here, he said, gesturing at the surrounding area in such a way that I was not certain if he simply meant within Tanzania, within Dar es Salaam, or within this specific neighbourhood. But I would later discover that he meant the latter, since the sound had, in fact, emerged from the very cluster of *uswahilini* that we were walking through. The genre is defined first and foremost by its breakneck pace, anywhere from 180 to 300 BPM, overlain with rapid-fire Swahili lyrics. It also makes aggressive use of samples, the bulk of which are drawn from local radio, from the traditional music of various ethno-linguistic groups within the region, and from field recordings made within the *uswahilini* themselves. The average *singeli* song contains no less than twenty such samples, most of which are compressed and accelerated to emulate percussive instruments. The result is an extremely energetic, rapid-fire sound that mirrors the desperate hustle of urban life. Emerging in part from marathon *kigodoro* parties – named after the foam mattresses on which people would collapse after hours of continuous dancing – the real vitality of the music is therefore best felt in the crush of the crowd, where moshing merges seamlessly with twerk-like *chura*. As explained by Rehema Tajiri, one of the most prominent *singeli* MCs, the sound 'is a very intense body experience. Once you get the beat, you can dance for hours; it's like a trance.'[80]

80 Quoted in Jeanne Lacaille 23 April 2020 'Singeli: The future sound of Tanzania is becoming a source of national pride', *Pan African Music*. https://pan-african-music.com/en/singeli-the-future-sound-of-tanzania/

Inspired by the traditional *vanga* polyrhythms of Zaramo music – as filtered through the *mchiriku* genre popular in the 1980s and 1990s – and also sampling from better-known Tanzanian genres like Bongo Flava and *taarab* as well as styles slightly further afield, such as Congolese *soukouss*, *singeli* literally remixes Tanzania's vast musical heritage. Similarly, *singeli* artists themselves understand the music to be an expression of genuine Tanzanian identity, often posed in loosely class-based terms against the elite music of both traditionalists and the modern middle strata. As explained by Jay Mitta, one of the genre's originators: 'The music is very powerful, it's pure adrenaline. But it is also a movement that unites all Tanzanians: it is our new national emblem, a real source of pride.'[81] Eventually, it would be adopted as such by the musical mainstream, with prominent Bongo Flava artists gradually coming around to sampling the sound, *singeli* MCs touring to sold-out audiences in Europe, and *singeli* tracks even reportedly played in the state house. But, throughout much of the 2010s, the journey of the genre rehashed the tumultuous social history of lower-class culture within the city more generally, in which the music scene had always been inseparable from recurrent moral panics and continual economic anxiety centred on the booming migrant population, as represented by the figure of the *mhuni*. As one might expect, then, *singeli* was often associated with criminality. Street party concerts in the *uswahilini* were frequently shut down by police raids and it was not uncommon for even well-known MCs to be arrested. The moral panic around the genre therefore harkened back to the early controversies over the import of hip-hop culture in the '90s.

Singeli would also become something of an exotic attraction for European onlookers – though now viewed through the club, rather than the colonial outpost – and a site of unease for urban elites both fearful of and dependent upon the city's lower strata. From either perspective, the local characteristics of the genre are exaggerated, and its erotic energy emphasised. If not demonised as a dangerous outpouring of criminal and sexual energies from the barely contained urban underclass, the genre is then romanticised as a new, experimental club music encapsulating the vitality of a rising Africa. But to anyone raised in poverty in any part of the world, the feeling of the music is not at all strange or exotic. It is instead intimate, something more like the universal pulse of the proletariat than a distinctly African cultural artifact. Any poor person can find their own equivalent. Seeing *singeli* played in the streets of the *uswahilini* invoked the rowdy punk shows, forest raves, and sketchy juggalo gatherings held in rundown nowhere towns across the American hinterland that populated my

81 Quoted in Ibid.

own early life. At the same time, the lyrics evoked the eternal themes of work and migration common to any *luk thung* song in Thailand. The fast-paced flow resembled that of the rust belt *hanmai* MC. Nor is *singeli* itself singular: in Kenya, *gengetone* has played a similar role, alongside the small and intensely experimental heavy metal scene. Recently, the East African labels that rose to prominence promoting *singeli* to the outside world have also reversed the flow, importing baile funk from São Paulo and experimental noise music from Java into the chittering smartphones of East Africa.

Perhaps the best comparison, then, is not Swahili hip-hop but instead the much earlier emergence of the equally syncretic *ngoma* music that defined life in the African districts during colonial rule. The various ethno-linguistic groups inhabiting what is today Tanzania all had their own indigenous traditions of music and dance, most centred around the drum. The centrality of these musical practices is evident in the term *ngoma* itself, which refers to various types of percussive instrument, to specific ceremonial events, and to the broader culture affiliated with drum-and-dance based ritual. These traditions not only survived in the urban setting under colonial rule but then began to evolve in interaction with one another and with imported music from the world at large. It was also in the urban context that the *ngoma* took on the character of a performance put on for entertainment, with a clearer divide between onlookers and participants. As onlookers, German colonial administrators spoke of the practice with a racially charged mixture of fear and exoticism:

> Women, whose naked torso and face are powdered with flour, dance it. Fantastically coloured strips of cloth and an assortment of animal skins cover the rest of the body, while on the head they wear high garland of feathers. To the beats of the drums they dance first in a circle, accompanying with a monotonous singing, carrying an axe in their hand and moving their behinds in a kind of grinding motion.
> ...
> The streets reverberate with the almost unbearable noise of the drums, flutes and other instruments, mixed with the strange rhythms of the wildly sentimental chants, and [women's] high trills. Everybody seems to be on his or her feet, either to dance or to watch. On these nights the 'negro' is not to be had for anything else, living only for his amusement.[82]

82 Quoted in Graebner, Werner, 'The *Ngoma* Impulse: From club to nightclub in Dar es Salaam', in Brennan et al. 2007, p. 179.

For the German, the simple pleasure of the African crowd takes on an almost eldritch character.[83] And of course this fear was inset within larger colonial anxieties. Bemoaning the impact of such dance parties on the efficiency of plantation labour and afraid of the potential for such gatherings to become a basis for anti-colonial organising, the Germans restricted *ngoma* performances to one or two days a week.[84]

Singeli thereby carries on the *ngoma* pulse in more ways than one. Most of all, it has become an obvious site for similar social anxieties, albeit ones in which explicit racial divides have been replaced by more subtle distinctions of culture and class. For *singeli* MCs, these divisions were part of what had inspired them in the first place. From their standpoint, even the forms of popular Tanzanian music that had historically been appropriated by the lower classes such as *taarab*, *dansi*, and Bongo Flava were actually products of the educated middle strata and international elite. *Taarab* was widely seen as having emerged from Zanzibari court music.[85] *Dansi* could trace its origins in part to ballroom dance clubs catering to Europeans in the colonial era. Similarly, Bongo Flava was 'started by the middle class who had been given access to cassettes to imitate American hip-hop' and was seen as largely representing and benefiting the middle and upper strata of society.[86] For this reason, many MCs understood *singeli* to be 'real' Tanzanian music, similar to *ngoma*, because it emerged from the authentic creativity of the urban majority in *uswahilini* street parties, openly contrasted to the anodyne style of Bongo Flava, which was produced in high-end studios emulating *reggaeton* and western hip-hop.

Many artists even embraced the term *wahuni* itself, emphasising the term's connotation of grinding and hustling to survive. In the video for one popular song by Msaga Sumu, 'Mwanaume Mashine' ('Machine Man'), Sumu raps in work overalls carrying a wrench while the camera works its way through various sites of informal life and labour within the *uswahilni*, showing *dala dala* conductors, informal workers in market stalls, people cheering in football clubs, streetside welders, ubiquitous car repairmen, and the many small acts of communal charity that knit the neighbourhood together. The lyrics emphasise the need to work hard and hold out for success: 'Know the character of a man / It's not his face / Not his ethnic group / Hard work makes a man.' But they also echo

83 Not coincidentally, anthropological reports such as these would go on to influence H.P. Lovecraft's distinctively racist horrors, which always included a similarly 'strange rhythms,' 'wild chants', ominous drumming, and, of course, the piping of flutes.

84 Graebner 2007, p. 178.

85 This claim has, however, been challenged by more recent academic literature.

86 van der Stockt, Anke 2019, p. 74.

the fusion of the body with industry in Xu Lizhi's proletarian poetry. Gutted machines populate the scene and plastics litter the sands under Sumu's feet as he raps: 'A man is a machine … I am a poor man, wallah [I swear] I don't have anything.' But, just like Chris, he always finishes on a hopeful tone: 'God will bless me eventually.'[87]

When I asked Chris if he liked *singeli* he nodded. He said it was authentic, joking that it reminded him of his life as a self-described *mhuni*. It captured the hustle, at least. And the hustle did not end. After I left, Chris gave up on selling paintings in the street and moved back to the country. At first, he returned to his family home near Mount Meru, helping his sister build a house and start a small agricultural plot. But his father – a refugee from the Uganda-Tanzania war at the end of the 1970s – had a land claim in Shinyanga Region in the northwest. Shinyanga is a largely agricultural area, but also has a large mining industry, most of which is 'artisanal' production in which plots are worked by hand using only simple tools. About a year after I had left, Chris inherited this plot and decided to try his hand at mining. But over the subsequent years he had a hard time affording licensing fees, paying to transport the ore hours away for processing, and buying any sort of equipment that could make the process more efficient. Worse, the ore vein did not seem particularly rich, making it difficult to effectively mine without machinery.

Eventually he gave up, moving back to the Arusha area where he helped with farm work and attempted to start his own tourism business. The details he gave me were vague, but it seems like he had begun building a guesthouse of some sort and offering guided hikes to foreigners. The business seemed to make little to no money, on balance. He survived mostly on food grown on their farm plot, subsistence farming subsidising the endless hustle. Soon, he moved on to the national capital Dodoma, in the centre of the country, where he bought into a venture raising grapes for wine and growing other crops for sale on the market. But they had trouble affording a tiller and had to rent one at exorbitant rates. Last I heard from him, they wanted to start planting watermelons and had put in several rows of corn for their own food. Throughout all of these ventures, friends and family suffered various health scares, farm animals died, the businesses were robbed, and crops were lost. None of the ventures ever seemed to make enough money to pay their basic costs, much less reinvest. Whenever I ask how the various businesses are going, however, his response is often less about the prospects for profitability and more an inventory of the hard work he's been putting in as he waits for his blessing, with the constant reminder that, ultimately, 'things are good.'

87 Lyrics translated by Van der Stockt (2019, pp. 128–31), modified slightly by author.

CHAPTER 11

The Diffraction of Africa

Bits of brain were splattered in bright red splotches on the rust-coloured bricks leading to the flaming archways of Parliament. Protestors had overwhelmed the lines of riot police guarding the gates. In response, police opened fire with live ammunition and continued to shoot even as much of the crowd fled. Their maroon, military-style armour was now smudged with ash and glittered with the spray of blood. Bodies moved through the pinkish fog of high-potency tear gas, colloquially referred to as 'Agent Orange.' Crowd control tanks charged behind, blasting groups of demonstrators with high-pressure columns of water dyed in orange and pink to assist with later identification.[1] Over the subsequent month, much of Nairobi would be painted in these gaudy colours as police pursued protestors through the labyrinthine streets, dousing residential complexes and market stalls in burning pink fog and glowing orange dye that then dripped down like a psychedelic rain from the balconies. The protests began in mid-June 2024 and, by the end of the month, nearly 40 people had been killed in cities across Kenya.[2] By mid-July, at least 32 were confirmed to have been shot dead by police.[3] The exact number of dead and injured remained unclear, however, since plainclothes police had also engaged in a series of systematic abductions, reviving an old intimidation tactic used during the unrest of the 1990s. Key activists, medical workers, and social media influencers were kidnapped on the street or even taken from their homes by armed men wearing hoods and masks, thrown into the trunk of an unmarked vehicle, and then tortured and interrogated for an indefinite period, with no charges filed. Some remained missing. Others were stripped and dropped in random locations many miles from their homes.[4]

1 Otieno, Steve 22 July 2024 'Explainer: What, exactly, is the reddish-orange tear gas police used on protesters?', *Nation*. https://nation.africa/kenya/news/explained-the-reddish-orange-tear-gas-used-on-protesters-4698270

2 Agence France-Presse in Nairobi 1 July 2024 'At least 39 killed in Kenya's anti-tax protests, says rights watchdog', *The Guardian*. https://www.theguardian.com/world/article/2024/jul/01/at-least-39-killed-in-kenyas-anti-tax-protests-says-rights-watchdog

3 Anna, Cara 20 July 2023 'Kenya police are told not to report deaths during protests. A watchdog says they killed 6 this week', *Associated Press*. https://apnews.com/article/kenya-protests-police-killing-economy-3826f96bfc84fa2c859e240a1e44b8ac

4 Dahir, Abdi Latif 6 July 2024 'After Deadly Protests, Kenyans Tell of Brutal Abductions', *The*

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Videos of shootings and indiscriminate attacks by police were shared via TikTok and streamed live on Instagram, as were the funeral ceremonies of murdered protestors. Similar to earlier waves of unrest in France, Hong Kong, the US, Chile, Sudan, and Sri Lanka, memetic tactics propagated via digital media allowed for more rapid mobilisation and flexible, networked forms of organisation less vulnerable to the assassination or abduction of key leaders. This resilience allowed protests to propagate after the crackdown that followed the storming of parliament. Similarly, the decentralised nature of the mobilisation ensured that protests could not simply be called off after the government began to compromise by withdrawing the Finance Bill that had triggered the protests in the first place, firing the cabinet (half of which was then rehired), and promising of further reforms.

Led by Kenya's booming population of tech-literate young urbanites, the unrest came to be referred to as the 'Gen Z protests.'[5] In this sense, they mirrored the demographic profile already seen in George Floyd Uprising in the US in 2020 and, soon after, the 'Gen Z Revolution' that broke out in August of 2024 in Bangladesh. But, although factors like age and the use of digital technology have often been cited as key explanatory variables in journalistic accounts of any given protest movement from the past twenty years, they are shared so universally between such events that they ultimately explain little. A far more important factor distinguishing the 2024 protests from earlier social movements in Kenya was the way that the young militants refused to engage in politics via traditional divides of race and tribal affiliation – ethnic factors which, though introduced by the British colonial administration, had since evolved into one of the dominant organising principles in post-colonial political life. In contrast, protestors instead invoked now-familiar themes of populist belonging and stressed the economic hardship faced by Kenyans, which was aggravated by the pandemic and then further amplified by slow growth and the government's subsequent implementation of an IMF-designed finance bill that would raise taxes on the poor to fund debt service payments.

Ironically, Ruto had pulled off his narrow victory in the 2022 election by appealing to this same youthful demographic. On the campaign trail, he had also promised to ease the pressure on the poor caused by the inflationary crisis that had followed the pandemic. In the first two years of the 2020s, 'real earnings growth [had] declined by an average of 2.7 %' while the cost of basic neces-

New York Times. https://www.nytimes.com/2024/07/06/world/africa/kenya-protests-abductions-taxes.html

5 Ngigi, Elizabeth 26 June 2024 'Gen Z protests: A revolution aided by technology', *Nation*. https://nation.africa/kenya/news/gen-z-protests-a-revolution-aided-by-technology-4669846

sities had skyrocketed. Though 2021 saw a recovery of growth after the shock of the pandemic, any gains made were then eroded by further inflation: 'Between June 2022 and June 2023 overall inflation averaged 8.7%, peaking at 9.6% in October 2022,' just a month after the election. Price increases were highest in the basic necessities such as food, housing, and transportation that composed the bulk of purchases for poor households.[6] In arid parts of the country, the situation was further worsened by an ongoing drought that is expected to only grow more severe as climate change drives desertification across the region.[7]

In the midst of this crisis, Ruto's campaign won just enough young voters to its side by propagandising his humble origins, gesturing toward 'bottom-up' development, and appealing to the huge share of the population consigned to survival in the informal economy. Despite this vaguely class-based narrative counterposing the informal 'hustlers' to the Kenyan political dynasty, however, Ruto himself was very much a part of that dynasty. After all, he was one of the richest men in the country and had served as long-time deputy president. It was only through a happy coincidence that he had been ejected from the core of the former political coalition in 2018, when a deal was struck by his two rivals Uhuru Kenyatta and Raila Odinga. Rather than the positive appeal of his programs, then, Ruto won a narrow victory simply because the promises made by Kenyatta's 'Jubilee' government to those employed in the informal economy – including universal health care, affordable housing, and lowering unemployment – had been left unfulfilled, all while Kenyatta and others (including Ruto himself) used their positions to expand their own business interests and those of their families and allies.

Ruto's own election campaign had therefore helped to stoke the class-based demands being made by the protestors who now sought his ouster. Though Nairobi is a smaller and wealthier city than Dar es Salaam, the same divides visible in the sprawling *uswahilini* and vast informal sector of Tanzania are, if anything, even more pronounced in Kenya.[8] As of the late 2010s, the 'informal

6 Shibia, Adan 16 October 2023 'Kenya's cost of living crisis: expert unpacks what's driving it and what should be done', *The Conversation*. https://theconversation.com/kenyas-cost-of-living-crisis-expert-unpacks-whats-driving-it-and-what-should-be-done-215487

7 Oloo, Dan 31 March 2017 'In Kenya, severe drought threatens to leave 4 million food insecure', *Unicef*. https://www.unicef.org/stories/kenya-severe-drought-threatens-leave-4-million-food-insecure

8 In fact, the very notion of the 'informal economy' was first popularised in a report on the Kenyan labour market produced by the ILO in 1972: Lockwood 2023. But the term itself was coined by economist Keith Hart in a study of Ghana. See: Hart 2002 'Decent Work and the Informal Economy', *International Labour Office*, ILO Conference 90th Session, Report VI, p. 1. https://www.ilo.org/media/120791/download

economy accounted for 83 percent of total employment' in the country and, in addition to composing an increasing share of jobs, the sector's output had also become more and more central to GDP growth. The informal economy's 'contribution to national income increased from 18.9 percent in 1999 to 33.8 percent in 2015.'[9] And yet, as measured by its concentration of 'high net worth individuals,' Nairobi remained among the wealthiest cities in Africa, ranking fourth behind Johannesburg, Cape Town, and Cairo.[10] The established political dynasties of figures like Odinga and Kenyatta therefore represented this inequality across multiple registers, combining governmental privilege with economic plunder.

The Kenyan political dynasty's approach to the commodities bubble initially followed that of the Tanzanian state under the Kikwete administration, inventing infrastructure projects in order to obtain loans and then padding the pockets of insiders through the lucrative real estate deals that followed. But, in Kenya, the backlash that accompanied the initial deflation of the bubble was simply routed into the conventional channels of ethnic politics. Without the kind of corruption scandal that had placed Magufili in power in Tanzania, Kenyatta's administration had no obligation to conduct tax reforms or reroute infrastructure spending into more sensible projects. Thus, while Kenya's Debt to GDP ratio had been only slightly higher than that of Tanzania in 2012 (38.2 percent versus 29.8 percent, respectively), by 2020, the figure had risen to a staggering 68.4 percent of GDP, compared to 37.9 percent in Tanzania. More importantly, by the early 2020s, many of the loans taken out in the 2010s were coming due.[11]

Throughout, Kenyan elites only saw their wealth increase, with the number of dollar millionaires in the country rising to 8,500 in 2021. High inflation nonetheless led to a depreciating shilling, slowly eroding the wealth of the country's elite and pushing the number of dollar millionaires back down to 7,200 by 2023.[12] This created domestic pressure to resolve the balance of pay-

9 FKE March 2021 'The informal Economy in Kenya', *Federation of Kenya Employers*, p. 8. https://www.ilo.org/media/381631/download

10 Henley & Partners 2024 'Insights into Africa's Wealthiest Cities', *The Africa Wealth Report 2024*. https://www.henleyglobal.com/publications/africa-wealth-report-2024/insights-africas-wealthiest-cities

11 Data from the Bank of Tanzania and Central Bank of Kenya, as aggregated on *Trading Economics*, indicators for 'Government Debt to GDP' by year: https://tradingeconomics.com/kenya/government-debt-to-gdp; https://tradingeconomics.com/tanzania/government-debt-to-gdp.

12 Ambani, Brian 17 April 2024 '500 wealthy Kenyans fall off dollar-millionaires list', *Business Daily*. https://www.businessdailyafrica.com/bd/economy/500-wealthy-kenyans-fall-off-dollar-millionaires-list-4592840

ments issue in a fashion that did not deflate asset values or impose taxes on the highest-earners, many of whom could move their funds out of Kenya if they chose. Despite his populist posturing, then, Ruto's new government had no choice but to 'to raise two hundred billion Kenya shillings ($1.55 billion) for debt servicing' such that 'sixty-on[e] out of every hundred shillings paid in taxes [would go] toward outstanding bills,' while also ensuring that the bulk of these taxes fell on common people, rather than the country's elites.[13]

Thus, the hated Finance Bill had both an extrinsic cause, in the form of IMF mandates, and an intrinsic one, insofar as domestic elites were using the bill to avoid bearing the burden of the numerous loans that, though often public, had been taken out through their intervention and in practice been paid out to their affiliated companies as contractors, intermediaries, or indirect beneficiaries. This is why, even though it was ostensibly a technocratic measure aimed at ensuring that the government could keep up with its payments to creditors, the bill nonetheless proposed that debt service be paid not through taxes on capital or real estate but instead via 'taxes or fees on a range of daily items and services including internet data, fuel, bank transfers, and diapers,' all alongside a wide-ranging redefinition of the 'digital marketplace' intended to enable better taxation of income from the informal economy.[14] To add insult to injury, the bill also included a number of expensive allocations for political elites, including billions of shillings devoted to the purchase of new cars and renovations for the offices and residences of the president, the deputy president, and their spouses.[15]

But Kenya's dependence on its wealthier creditors was also visible, in a less direct fashion, in the country's increasingly central role as an outpost for US geopolitical power in Africa – both in the direct sense and indirectly via other important recipients of US patronage such as Israel. In fact, the very police force cracking down on the protestors had received US training and US aid money, some of which was likely used to purchase weapons and military equipment from Israeli firms. In videos of Kenyan police attacking and opening fire on protestors, for example, many can be seen carrying Israeli-made Jericho 941

13 Al-Bulushi, Samar 24 July 2024 'The Global Stakes of Kenya's Protests', *Jacobin*. https://jacobin.com/2024/07/kenya-protests-taxes-global-stakes

14 Africanews with AP 26 June 2024 'Kenya's finance bill: this is what led to the protest', *Africanews*. https://www.africanews.com/2024/06/26/kenyas-finance-bill-this-is-what-led-to-the-protest//

15 Magale, Eric and Schmidt, Mario 16 July 2024 'Kenya protests show citizens don't trust government with their tax money: can Ruto make a meaningful new deal?' *The Conversation*. https://theconversation.com/kenya-protests-show-citizens-dont-trust-government-with-their-tax-money-can-ruto-make-a-meaningful-new-deal-234008

pistols, one of the official sidearms of the Nairobi police force. These images were reflections of larger trends: over the course of the 2010s, even while US aid to Africa declined, its military funding increased rapidly. In those same years, Israel grew into one of the most active arms dealers on the continent.[16] Both forms of support were justified in terms of combating radical Islam but have now increasingly been deployed against domestic protests in countries across Africa, from Eswatini to Nigeria.

And Kenya was a major recipient. The US provided some 400 million USD in counterterrorism funding to the country between 2010 and 2020.[17] Meanwhile, as the interests of traditional allies such as the Saudis, Turks, and Emiratis have begun to diverge from those of the US, and new, less American-friendly governments have arisen across the Sahel, Kenya's role as a military outpost of US power has only grown in importance. In the early 2020s, Kenya therefore joined 'Operation Prosperity Guardian, a US-led multinational coalition designed to protect the flow of global trade in the Red Sea amidst the blockade led by Yemen's de facto Houthi government.' Then, shortly before the protests in 2024, Ruto visited the White House, where President Biden 'announced that the country had been designated a major non-NATO ally.'[18] Meanwhile, the UK has also retained a close relationship with its former colony, remaining one of the largest investors in the country and keeping 'roughly 200 military personnel permanently based in Kenya since the country grained independence,' including its British Army Training Unit Kenya (BATUK), officers of which 'have been accused of murder, the sexual abuse of local women, and the use of dangerous chemicals close to their base in Nanyuki, in northern Kenya,' where BATUK troops provide 'anti-terrorism training to around 1,000 Kenyan soldiers fighting al-Shabab in neighbouring Somalia.'[19]

However, although cost of living has been the immediate trigger for the political crisis, the corrupt local dynasty its proximate target, and the US and IMF the dark forces moving behind the curtain, its deeper roots are easily traced back to structural issues of underdevelopment. For liberal thinkers, the solution therefore boils down to the need for local elites – whether Ruto or some replacement – to mobilise the existing political dynasty in service of a more

16 Wezeman, Siemon T. 2011 'Israeli Arms Transfers to Sub-Saharan Africa', *SIPRI Background Paper*. https://www.nonproliferation.eu//wp-content/uploads/2018/09/siemontwezeman4e9eb5e5806bd.pdf

17 Samar 2024.

18 Samar 2024.

19 Gbadamosi, Nosmot 6 September 2023 'A Challenge to British Impunity in Kenya', *Foreign Policy*. https://foreignpolicy.com/2023/09/06/batuk-british-soldiers-kenya-wanjiru-murder/

thorough marketisation. This would require a coherent developmental agenda in which 'government policy actively promotes business development and job creation.' At most, this development agenda might include popular mobilisation campaigns to 'amplify state capacity and foster state-society cooperation,' making up for shortfalls in education, healthcare, and other basic services.[20] But it would also require the systematic disciplining of the population, as in any other austerity program.

More importantly, the success or failure of any such development agenda would depend more on the changing temper of global accumulation than on local institutional reforms. The burning of the Kenyan parliament and the bloody assault on the population that followed therefore serve as a concise symbol for the basic political-economic conundrum faced by countries across the continent. For this reason, we can learn more about the underlying causes of the crisis facing Kenya and other countries across Sub-Saharan Africa not by turning to the common sense of liberal pundits and policymakers, who will always repeat the mantra of 'development,' but instead by looking into the long history of debates on the nature of African underdevelopment and the mechanics of imperialism on the continent in the postcolonial era – debates that were produced and developed within a vibrant socialist movement that once emerged from insurrectionary energies much like those reappearing across the continent today. And, at the centre of that movement, we again find Dar es Salaam.

1 The Dar es Salaam School

Though nominally socialist and extremely active as a centre for Pan-African politics, the Tanzanian mainland had followed a moderate path to decolonisation and Nyerere himself had never been associated with the communist wing of the Pan-African movement. He was instead attracted to Fabian socialism, encountered while studying in Edinburgh in the late 1940s. Nor was he alone in this regard, as Fabianism had become a major influence on an entire generation of future political leaders and economic policymakers across the former British colonies by the late colonial period, including Jawaharlal Nehru in India, Obafemi Awolowo in Nigeria, Lee Kuan Yew in Singapore, Muhammad

20 Opalo, Ken 19 July 2024 'Kenyan Protests, Part Three: Thoughts on potential pathways forward', *An Africanist Perspective*. https://www.africanistperspective.com/p/kenyan-protests-part-three-thoughts

Ali Jinnah in Pakistan, and Michel Aflaq (the founder of Ba'athism) in Syria.[21] Unlike the revolutionary Afro-Shirazi Party in Zanzibar with which it would later merge, Nyerere's Tanganyika African National Union (TANU, predecessor of the CCM, which has ruled the country since independence) therefore adopted a gradualist strategy that won independence without violent rebellion.

The party then pursued a developmental path that, though autonomous, nonetheless relied on a certain degree of economic support from the wealthy countries, as was visible in regular loans and guidance received from the World Bank.[22] Throughout, Tanzania remained unaligned with either of the major Cold War powers, working most closely with other non-aligned nations such as Yugoslavia and China. Altogether, this ensured that the country remained relatively stable and non-denominational throughout the postwar period, which then allowed it to serve as a sort of anchor for the larger decolonial movement. By the 1960s, the city had become known as something of a 'revolutionary capital,' housing political refugees from all over the world, hosting talks by visiting revolutionary veterans and major Black Power organisers, and serving as an organisational base for the anti-apartheid movement and for the left-wing factions within ongoing civil wars in places like Mozambique.[23]

Ironically, it was the generally moderate, Fabian-style approach of TANU that enabled Tanzania to then function as a major frontline state in the ongoing anti-imperialist struggles raging across the southern half of the continent: 'During the early years of the liberation struggle, Dar es Salaam was the terminus of an extensive underground railway that funnelled exiled military personnel from all over the region into and through Tanzania for training.'[24] It was host to the exile headquarters for Mozambique's FRELIMO and South Africa's ANC, both of which operated military camps in the country: 'Indeed, the Tanzanian countryside was dotted with military installations hosting foreign guerrilla

21 Marshall, Julian 14 October 1999 'Obituary: Julius Nyerere', *The Guardian*. https://www.theguardian.com/news/1999/oct/15/guardianobituaries; Barr 2002; Javed 2015; Baram 2003.

22 Payer 1983.

23 Early on in the postwar period, Dar es Salaam was one of several such capitals across the African continent, alongside Accra, Algiers, Addis Ababa, Cairo and Khartoum. But political events in these other centres saw their intellectual milieus dispersed one after the other. For the role played by student radicalism in Ethiopia, see: Zeleke 2020. For the role of Algiers, see: Bounab, Youcef Oussama 2020 'Algeria's forgotten revolutionary history', *Africa is a Country*, March. https://africasacountry.com/2020/03/algerias-forgotten-revolutionary-history

24 Schroeder 2012, p. 14.

armies.'[25] Meanwhile, many of these rebel bases were armed through 'military supply chains that ran through Tanzanian ports,' including (by 1972) some $40 million of Chinese military funding, and the soldiers in these camps 'received instruction from Cuban, Russian, Algerian, and Chinese military trainers.'[26] Often, 'humanitarian' aid gathered by anti-apartheid activists in the wealthy countries would be funnelled into these networks.[27]

Sites such as the terrace of the New Africa Hotel thereby became informal hubs for discussing revolutionary politics and decolonial statecraft. As described by one journalist at the time:

> All of Africa conspires here these days. Here gather the fugitives, refugees, and emigrants from various parts of the continent. One can spot sitting at one table Mondlane from Mozambique, Kaunda from Zambia, Mugabe from Rhodesia. At another – Karume from Zanzibar, Chisiza from Malawi, Nujoma from Namibia, etc.[28]

Meanwhile, at the University of Dar es Salaam (UDSM), 'future Ugandan president Yoweri Museveni convened Sunday morning "ideological classes" attended by students and professors who pored over *Capital*.'[29]

In fact, UDSM soon emerged as something like the intellectual centre of the revolutionary capital, as socialist faculty from all over the world helped to shape the university into a major hub for Marxist scholarship. What would have been a marginal and mostly academic study group in any other setting here helped set the course for postcolonial nation-building. In fact, it would be no exaggeration to argue that this broadly defined 'Dar es Salaam School' was one of the most important centres for communist thought in the twentieth century.[30] The sheer range of its influence is staggering. Above all, UDSM was one of the

25 Ibid.

26 Ibid.

27 Ibid.

28 Kapucinski, Ryszard, Quoted. in Ivaska, Andrew 24 January 2022 'Decolonizing Refugees: Exile and Political Possibility in 1960s Dar es Salaam', *Stateless Histories*. https://statelesshistories.org/article/decolonizing-refugees-exile-and-political-possibility-in-1960s-dar-es-salaam

29 Harris, 2022.

30 We might even think of the Dar es Salaam School as something like the inverse of the Frankfurt School. While the latter has grown to widespread renown despite making only academic contributions with little impact on the course of the really-existing communist movement, the former has been largely ignored within academia despite its substantial practical contribution to popular struggles in the postwar period.

major sites in which dependency theory matured, evolving from its largely liberal roots in Latin American structuralism to take on an increasingly Marxian character. Samir Amin and Andre Gunder Frank both made visits to UDSM, with Amin's work triggering a series of debates among those in the city's intellectual circle that helped flesh out later theories of imperialism. Walter Rodney taught at the school for much of the late 1960s and early 1970s, writing much of *How Europe Underdeveloped Africa* during this time.[31] Similarly, Tamás Szentes drafted *The Political Economy of Underdevelopment* while teaching at UDSM in the same years.[32] But the influence on world systems theory was equally direct: Giovanni Arrighi taught there and Immanuel Wallerstein made frequent visits after being forced to leave Columbia University for sympathising with student protesters.[33] Meanwhile, Nyerere himself 'would arrive on campus to field questions from students – earning himself the nickname *Mwalimu*, "teacher" in Kiswahili.'[34]

In 1967, the Arusha Declaration announced Tanzania's turn to an explicitly socialist project of self-reliance, which was framed as an attempt to actualise the theory of *Ujamaa* formulated by Nyerere over the preceding years. The declaration was followed by the rapid expansion of state control over the economy, as 'the Government nationalised private banks, took over majority ownership of the seven largest firms, and acquired complete control of the National Insurance Corporation.'[35] In the countryside, nationalisation was paired with the rollout of rural cooperatives which were initially organised in a bottom-up fashion but later became vehicles for an increasingly top-down 'villagization' program, in which the widely dispersed rural population was resettled into centralised villages, reducing infrastructure costs while also mimicking a certain apocryphal picture of ancestral village culture frequently invoked in the mythos of African socialism.[36]

As a result, UDSM became the site for a series of discussions, later referred to as the 'Dar es Salaam Debates,' focusing on the character of the postcolonial state as elaborated through several interrelated questions:

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31 Zelig, Leo 2 May 2022 'The Dar es Salaam Years', *Africa is a Country*. https://africasacountry.com/2022/05/the-dar-es-salaam-years

32 Szentes, Tamás 8 November 2018 'To be Bravely Critical of Reality: an interview with Tamás Szentes', *Review of African Political Economy*. https://roape.net/to-be-bravely-critical-to-reality-an-interview-with-tamas-szentes/

33 Arrighi 2009.

34 Harris 2022.

35 Stein 1985, p. 105.

36 Coulson 2013, pp. 208–309.

> (1) What is the nature of the ruling class in the neo-colonies? (2) What is the relationship between the attempt to build socialism and the national question, given the reality of imperialism? (3) What is the relationship between the base and the superstructure and is there anything specific about this relationship under the condition of domination by foreign capital? (4) What is the nature of neo-colonialism, and how can it be combated?[37]

Some of those involved argued that the socialist measures undertaken by the TANU government were enough to prove the socialist character of the state, despite any consideration of which social class was in control of political power.[38] After all, at the official level, 'Nyerere denied that there were classes in African society.'[39]

This followed naturally from his embrace of classical political economy, within which the question of class largely concerns the distribution of the social surplus, while the concrete methods through which this surplus is produced and the economic forms that emerge to administer it (such as money, wage labour, etc.) exist as an ahistorical, purely technical substrate underlying all societies. In his 1962 pamphlet introducing the concept of *Ujamaa*, for example, Nyerere claimed that '[t]he basic difference between a socialist society and a capitalist society does not lie in their methods of producing wealth, but in the way that wealth is distributed.'[40] But, given that positions such as this contradict the most basic tenets of Marxian thought – and are, in fact, many of the same positions that Marx himself argued against – they were challenged by others within the UDSM milieu, and the debate thereby grew into a more general appraisal of Marxism and, in particular, the theory of the state as a class institution.[41]

The ensuing debate also illustrates the international impact of the Dar es Salaam School – both on the development of socialist theory and on concrete political struggles occurring across the globe. Central figures included Issa Shivji, whose *Class Struggles in Tanzania* would go on to become the definitive study of the postcolonial 'bureaucratic bourgeoisie,' and John Saul, who would later work at York University in Canada and edit the *Socialist Register*.

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37 Nabolsy 2024, p. 246.

38 This position is expressed in: Mwansasu, Bismarck U. and Pratt, Cranford, 'Tanzania's Strategy for the Transition to Socialism', in Mwansasu and Pratt (Eds.) 1979, pp. 5–6.

39 Coulson 2013, p. 280.

40 Quoted in Ibid.

41 Stein 1985.

Meanwhile, Yash Tandon and Dani Wadada Nabudere led the Uganda National Liberation Front (UNLF) while Yoweri Museveni formed the University Student's African Revolutionary Front – of which Sudan's revolutionary leader John Garang, another UDSM alumni, was also a member – and both organisations would help to overthrow Idi Amin's right-wing government in Uganda. The UNLF briefly ruled the country before splintering under a coup, sending both Tandon and Nabudere into exile and initiating the armed conflict through which Museveni would gain the presidency. Similarly, after returning to Uganda under Museveni's administration, Mahmood Mamdani founded a major research NGO and went on to become an important public intellectual in UN and human rights circles, holding visiting professorships in South Africa, India, and at Ivy League universities in the US. Other figures like Peter Meyns went on to lecture in Zambia before returning to work in academic Marxist circles in Germany.

Minor players in the UDSM scene also played outsized roles in global politics over the coming decades: Arrighi and fellow Italian UDSM appointee Luisa Passerini would found the Gruppo Gramsci upon their return to Italy, introducing elements of these debates into the early *autonomia* and thereby linking the Dar es Salaam School to what would become the mainline of revolutionary struggle in Europe in the final decades of the century. Meanwhile, Sol Picciotto, who taught at Dar es Salaam from 1964–68, and Jairus Banaji, who worked as an external examiner at the university in the early 1970s, would both go on to influence similar state debates within the Conference of Socialist Economists (CSE) in Britain in the latter 1970s and early 1980s, as well as the Open Marxism circle that emerged from the CSE in the 1990s – and, via this pathway, the Dar es Salaam Debates would even exert a vestigial influence on the new communist currents that emerged out of the squares movements in Europe and Occupy in the US, within which the work of CSE and Open Marxist figures have served as central touchstones.[42] The debates at UDSM also reverberated into the New Left in the United States. Aside from the obvious influence on the black diaspora – Malcolm X, Stokely Carmichael, Angela Davis, Eldridge Cleaver, and CLR James all gave talks in the city in these years – the UDSM circle had direct links to New Left student politics, as in the figure of Jim Mellen, who was at UDSM at the same time as Arrighi and, upon returning to the US, was instrumental in

42 Picciotto's tenure is well documented. For Banaji's time at UDSM, see: Banaji, Jairus 22 January 2021 '"Where is the working class? It's all over the world today": Jairus Banaji in conversation with Sheetal Chhabri and Andrew Liu', *Borderlines*. https://borderlines-cssaame.org/posts/2021/1/18/where-is-the-working-class-its-all-over-the-world-today

cohering a Marxist current within the Students for a Democratic Society before going on to help found the Weathermen.[43]

2 The State Debate

But it would also be disingenuous to pose a harsh divide between the more academic Marxian current represented by figures like Amin or Arrighi and the more mainstream liberal socialism of Nyerere and other African statesmen rubbing shoulders at the New Africa Hotel. The rebellious content of development within and against the imperial order was the ultimate foundation uniting all factions involved in the city's vibrant political life. Even the most radical of the Marxian critiques from this era ultimately lay on a basic continuum with the very theories of modernisation that they were critiquing. This is why tours of rebel camps in Mozambique could be paired so easily with visits by World Bank teams lauding administrative decentralisation and the top-down villagisation program as effective methods to intensify the production of cash crops. The same tense coexistence was visible in the case of UDSM itself, where elite interests in the wealthy countries played a central role:

> … the main financing for the university came from external resources. In particular British and United States-based foundations were very active in the shaping of the curriculum and instruction in the university in a way which met their desire to train a compliant middle class.[44]

Much of the day-to-day functioning of the university, then, was designed to produce competent administrators willing to work within the existing global institutions, rather than revolutionise them.

Similarly, although Nyerere's Arusha Declaration would be presented as an attack on the international economic orthodoxy and, in retrospect, recast as if it were an alternative to the structural adjustment programs foisted on African countries in the 1980s, in reality, the very institutions that formulated these structural adjustment programs had also helped to fund many of the hallmark projects of 'African socialism' itself. In the Tanzanian case: 'Between 1969 and 1979, the [World] Bank provided significant financial and technical support for Nyerere's ujamaa plans as part of a decade-long experiment,' in which

43 Arrighi 2009.
44 Campbell 1991, p. 102.

Bank President Robert McNamara (fresh from his position as US Secretary of Defence) had sought 'to shift [the Bank's] guiding framework for development away from a capital-intensive form of industrial development towards a strategic vision centred on the elimination of extreme poverty in rural areas.'[45]

Under McNamara's leadership, lending to Tanzania therefore 'concentrated on development projects rather than budgetary support.'[46] Initially, this lending carried with it few conditionalities and required nothing like the privatisation or austerity measures that would later be associated with lending from US-aligned multilaterals. In fact, in line with the postwar economic orthodoxy, the World Bank even helped to bolster the expansion of state-owned firms in the wake of the Arusha Declaration: 'Between 1970 and 1980 the Bank … provided $256 million for agriculture, mostly in support of crop parastatals.'[47] At the larger scale, the Tanzanian case arguably served as something of an experimental template for the pivot to rural developmental projects made by US-backed multilateral institutions worldwide in the same period. Making use of new agricultural technologies that had emerged from similar programs in Mexico, the Philippines, and India, such projects would help to push the global green revolution toward its final frontier, combating the threat of peasant rebellions, deepening market dependence, accelerating the global trend toward deagrarianisation, and creating an institutional substrate for the deployment of imperial power across the global hinterland.

In part, then, we can understand the nation-building projects of postcolonial Africa as developmental campaigns led by local elites, usually positioned at the helm of popular movements for national liberation, inset within and subordinate to the even larger developmental drive that gave shape to US hegemony. When the interests of these two elite groups diverged – as occurred in response to the economic crisis that began in 1973, or when local elites aligned themselves with the Soviets, as in Somalia – the developmental programs pursued by these subaltern elites were sacrificed to the grander interests of their ultimate patrons. Thus, even though decolonisation seemed to be accompanied by the emergence of a somewhat autonomous 'national bourgeoisie' within the newly independent countries, the subordination of the national liberation movement to this nested series of elite-led projects actually resulted in something less. For this reason, some participants in the Dar es Salaam Debates, such as Tandon, argued that the bureaucratic elite in a country like Tanzania

45 Delehanty 2020.

46 Fennell, Ron 1 May 2000 'Nyerere and the World Bank', *Tanzanian Affairs*. https://www.tzaffairs.org/2000/05/nyerere-and-the-world-bank/

47 Ibid.

did not even constitute a class as such, since its power had no basis in the relations of production: 'the effective control over the means of production in Tanzania is not in the hands of the economic apparatuses of the state … this control is shared with multinational corporations, and … this sharing puts the multinationals in a dominant relationship with the state parastatals.'[48] In Nabudere's words, the state is always 'an institution which exists for the total interests of the total class …'[49] Specific post-colonial governments and the elites in control of them can therefore only be understood through their position relative to the planetary flows of value governed by the total social capital.

Although figures like Tandon and Nabudere counterposed their arguments to a theory of the 'bureaucratic bourgeoisie' put forward by Shivji, Shivji's position was not so dissimilar: 'the so-called "national bourgeoisies" in Africa … are neither national nor bourgeois …' Ultimately, they are better described as bureaucratic strata of the petty bourgeoisie (or even, following Paul Baran, a 'lumpenbourgoiesie'), since they derived their wealth and power largely through their monopoly over civic institutions. For this reason,

> From the start the ruling petty bourgeoisie lack an objective independent economic base except the one provided by the colonial economy, which was itself an appendage of the metropolitan economy. The most they could do was to liquidate those *specific* features (where it had not already been done) which tied the economy and the institutions to a particular metropolitan country (mother country) and instead *multilateralise* the imperialist domination thereby becoming authentically part of the world capitalist system.[50]

In fact, even the ostensibly national element of the popular movement was itself often sacrificed: 'instead of *nationalism*, petty bourgeois squabbles, using ethnicism as their ideological smokescreen, became the order of the day.'[51] Control of the postcolonial state therefore ended up in the hands of a subaltern elite often propped up by some combination of international patronage and military power, with an ethnic base of domestic support rather than a truly national one, and which could only reproduce itself by skimming off lines of

48 Tando, "Who is the Ruling Class in the Semi-Colony?" in Tandon 1982, p. 50.

49 Nabudere, 'Imperialism, State, Class and Race (A Critique of Shivji's *Class Struggles in Tanzania*)' in Tandon 1982, p. 66.

50 Shivji 1976, pp. 21–2.

51 Ibid.

credit from the wealthy countries or from the ground rent charged on crops and raw materials.

Lacking an intensive industrial growth engine on which to root its economic power, the 'multilateralization of imperialist domination' would effectively strengthen the 'lumpen' character of this fraction of the global capitalist class over the subsequent decades. Though Shivji was mostly writing about Tanzania – where certain elements, such as the ethnicisation of politics following from colonial rule, were actually less pronounced – the basic pattern would be expressed even more clearly in neighbouring Kenya, where the civic power of the petty bourgeoisie slowly metastasised into what has today become a quasi-hereditary political dynasty centred on the contest between two leading families (the Kenyattas and Odingas). Ironically, the same fate awaited Uganda, where Museveni (whose UDSM thesis had focused on the work of Franz Fanon) also found himself with little choice but to shake hands with Ronald Reagan and agree to an IMF recovery program in the wake of the long-fought Bush War. Similarly, faced with ongoing insurgencies, Museveni's new government fell back on precisely the sort of ethnicism that Shivji had warned of. Similar fates would eventually befall other revolutionary governments in places like Zimbabwe, Angola, and Mozambique.

But this outcome was not at all clear at the time. In the postwar decades, relatively high prices for agricultural goods enabled poorer countries across the Global South to undertake ambitious industrialisation programs that (at least initially) seemed set to produce their own national blocs of capital with a basis in domestic manufacturing. Although many of these industrial booms are all but forgotten today, their momentum at the time was comparable to that of later 'economic miracles' in East Asia. For example: 'Had Brazil's per capita GDP continued to grow at its 1970–1975 average rate for twenty-five more years, it would have been richer than France and the United Kingdom by the year 2000.'[52] Similarly, in Mexico, 'manufacturing employment grew significantly, from 11.8 percent in 1950 to 16.5 percent in 1965,' seeming to indicate a classic case of industrial take-off.[53] In Africa, 'the Ivory Coast, of all places, was considered a poster child for economic development, the namesake for the now-forgotten "Ivorian miracle".'[54] Much like today, infrastructural megapro-

52 Oks and Williams 2022.

53 Benanav 2015. p. 191. In fact, as Benanav points out in the surrounding paragraph, Mexico was something of an exception to the general trend, since the rise in manufacturing's share of employment was muted by the substantial absolute growth in total employment occurring at the same time.

54 Oks and Williams 2022.

jects were often invoked as evidence of the supposed industrial take-off: the Volta River Project in Nkrumah's Ghana, the TRICO nuclear reactor in Mobutu's Zaire (now the DRC), and the 'Great Man-Made River' proposed by Gaddafi in Libya. In fact, the initial engineering plans for two of the largest megaprojects to have been constructed on the continent during the recent commodities boom – the Grand Ethiopian Renaissance Dam and the Julius Nyerere Hydropower Station – both originated in this earlier period only to be scrapped when the crisis broke out in the 1980s.

Postcolonial developmental efforts generally followed a policy of 'import substitution industrialization' (ISI) in which countries used high tariffs and inflated currency rates to make the import of finished industrial goods from rich countries more expensive and then using the foreign exchange earned from exporting natural resources (again, at historically high prices) to purchase their own industrial machinery and intermediate inputs that could then be used to develop a domestic manufacturing base to serve the tariff-protected national market. These ISI policies were modelled in part on the experiences of other 'late-developers' from the nineteenth century onward, including Germany, Japan, and of course the US. After all, the American System itself had piloted the use of tariffs as a bargaining tool to even out unfavourable terms of trade. But the ISI projects popular in this period depended on a few key presumptions: First, they assumed that commodities prices would remain high enough for long enough to ensure steady imports of fixed capital and intermediate inputs, which were necessary to get the manufacturing base up and running. Second, many of the models that they were based on assumed that global trade would continue to grow at a relatively slow pace, as it had in the 1930s and 1940s. Third, they assumed that the challenges of catch-up development in the later twentieth century were much the same as they had been a century prior, when the more rudimentary nature of industrial technologies ensured a lower barrier to entry for largely agrarian economies.

On all three counts, they would be proven wrong. The green revolution would see productivity growth in agriculture outpace that of industry, causing the value of agricultural exports to plummet. Knit together by the General Agreement on Tariffs and Trade (GATT) and the military state built up by the US in the Cold War, trade between the wealthier countries grew rapidly from the 1950s onwards, stoking further growth of industrial output and employment in places like Europe and Japan. And, finally, the divides separating 'late-developers' from the industrialised nations had grown into a vast sociotechnical chasm in the century since the emergence of the earlier developmental states. The scientific complexity of industry had increased, the relative distance between poor and rich areas of the world had widened, and the military might

of the reigning hegemonic power had also grown to previously unimaginable proportions.

Nonetheless, these ISI policies were rooted in widely shared presumptions drawn from orthodox economic theory, and they were adopted by an equally wide range of governments throughout the Global South, including those aligned with the US, those aligned with the USSR, and those occupying various non-aligned positions in between. Even in cases like Tanzania, where rural development was emphasised above and beyond the development of manufacturing in urban centres, the same basic methods were deployed. This also means that modernisation theory as such cannot simply be reduced to top-down models imposed by representatives of the economic orthodoxy (epitomised by Rostow) or the prevailing political order (epitomised by Truman). At the more practical level, the shifting orthodoxy of development economics was formulated through dynamic and often collaborative engagement with policies that were themselves developed through debate with thinkers and policymakers throughout the postcolonial world. The ideology of modernisation and its affiliated industrial drives were therefore built from the bottom up as much as they were mandated from above.

The more complex reality is well illustrated by the case of W. Arthur Lewis, a Saint Lucian economist trained at the London School of Economics (where he was also the first black faculty member) who later went on to work as professor of political economy at Princeton (where he was also the first black instructor to hold a full professorship). In London from 1933 to 1948, his social circle included anti-imperialist thinkers from across the Black Atlantic intellectual milieu such as C.L.R. James, George Padmore, Jomo Kenyatta, and, later, Kwame Nkrumah. However, similar to Nyerere, Lewis forged the closest links with the reform-minded Fabians. He did work for the Fabian Colonial Bureau, and his first book, a history of the workers' movement in the Caribbean, was published by the Fabian Society. In general, he also followed the more general Fabian practice of condemning both the racist right-wing establishment and the alleged impracticality of the more militant left-wing anti-imperialists.[55] His political practice was firmly rooted in the idea that moral appeals to power could create effective change if paired with coherent programs for reform that ensured the overall stability of the political and economic order, even if these changes eroded the power of existing elites.

55 Ingham, Barbara, and Mosley, Paul 2010 '"Marvellous intellectual feasts": Arthur Lewis at the London School of Economics 1933–1948', *University of Manchester*, Brooks World Poverty Institute Working Paper 124. https://hummedia.manchester.ac.uk/institutes/gdi/publications/workingpapers/bwpi/bwpi-wp-12410.pdf

At the theoretical level, he was influenced by the classical political economists, and he crafted his model of development based largely on British history. This model, formulated in the early 1950s, placed emphasis on the role of the rural labour surplus in driving industrialisation, proposing a universal, replicable process of structural transformation whereby labour drawn out of this 'traditional' rural sector defined by employment in agriculture drove the development of a 'modern' urban sector with its basis in manufacturing. But he also stressed that replicating the classical development process required state intervention, especially at the very earliest stages: 'Through state planning, innovations in agricultural production could be initiated and the negative consequences of subsequent industrialization, especially inequality, could be mitigated.'[56] Like many others within the economic orthodoxy of the time, Lewis was therefore a strong proponent of industrial planning – he had, in fact, written the book on it (*The Principles of Economic Planning*, published in 1949). For Lewis, the globalisation of state-led development projects and national planning infrastructure via funding from emerging multilateral institutions such as the UN could even serve as an effective form of reparations for former colonies.

Widely considered to be one of the founding fathers of the discipline of developmental economics, Lewis was knighted in 1963 and awarded the Nobel Prize in Economics in 1979. But he was also deeply involved in the practical politics of development on the ground. Given both this expertise and his unique position within the Black Atlantic milieu, beginning in the 1950s, he went on a series of research trips to West Africa and the Caribbean to produce policy papers for major multilateral institutions such as the OECD. In this same capacity, he also served as an economic advisor to postcolonial governments that had begun to implement ISI programs.[57] Here, we again find an overlap between orthodox developmentalism and the more radical programs of African socialism: Lewis was paid by the UN to serve as Ghana's Chief Economic Advisor in 1957–8 at the invitation of Kwame Nkrumah (who he had known during Nkrumah's brief stint at LSE in the '40s). In this capacity, Lewis helped to reorganise the country's sterling balances and contributed to the drafting of the first Five-Year Plan. Though he would ultimately quit after his relationship with Nkrumah deteriorated, the substance of their disagreement had little to do with the core of Ghana's ISI strategy – which leveraged financial surpluses from the cocoa industry to fund developmental projects – and more to do with exactly how these surpluses should be allocated. Similarly,

56 Getachew 2019, p. 147.

57 Koffi 1980.

although Lewis expressed a personal distaste for what he saw as Nkrumah's growing authoritarianism, his main concern in this regard was simply that the widespread use of political patronage created expensive forms of corruption that threatened to eat away at necessary funds for industry.[58]

3 Development and Dependency

Though what would come to be known as dependency theory would define itself in part through its critique of mainstream developmentalism, its origins exhibited a basic continuity with the modernisation project represented by Lewis and Rostow. In fact, the earliest iteration of the dependency thesis had not originated among socialists at all but was instead formulated by liberal economists Hans Singer and Raúl Prebisch. In what came to be known as the Prebisch-Singer hypothesis, the two argued as early as 1949 that the pattern of falling real prices for primary commodities relative to industrial goods ultimately led to a form of unequal exchange that systematically benefited the industrialised countries of the Global North, as deteriorating terms of trade would see poorer countries forced to export more and more primary commodities in order to import the same amount of manufactured goods. Singer argued that this allowed workers in high-income countries to gain more benefits from world trade than those in low-income countries. Meanwhile, Prebisch located the source of the problem in the oversupply of rural labour.[59] The theory was further developed by other Latin American structuralists such as Celso Monteiro Furtado and Aníbal Pinto Santa Cruz as well as by nominally Marxist thinkers such as Fernando Henrique Cardoso (who later became president of Brazil on a neoliberal platform).

In much the same way that national development drives were inset within the international developmental consensus of US hegemony, the critique of modernisation launched by the dependency theorists also operated both within and against the prevailing institutions of the ruling class. Throughout the

58 Tignor 2006, pp. 144–78.

59 The hypothesis has not only held up over subsequent decades but has been further confirmed by more systematic statistical studies and broadly incorporated into the economic orthodoxy. In general, greater emphasis is now placed on the cyclical nature of the overall trend, shaped by commodity supercycles that periodically elevate demand for primary goods. For instance: Rabah Arzeki, Kaddour Hadri, Prakash Loungani, Yao Rao August 2013 'Testing the Prebisch-Singer Hypothesis since 1650: Evidence from Panel Techniques that Allow for Multiple Breaks', *IMF Working Paper*. https://www.imf.org/external/pubs/ft/wp/2013/wp13180.pdf

latter half of the twentieth century, the Prebisch-Singer theory of unequal exchange was gradually incorporated into the operating logic of major international development agencies. Foremost among these were institutions such as the Economic Commission for Latin America (chaired by Prebisch beginning in 1950) and the United Nations Conference on Trade and Development (of which both Prebisch and Furtado were founding members, with Prebisch serving as UNCTAD secretary-general from 1964 to 1969). Alongside various non-aligned countries and the 'Group of 77' within the UN, UNCTAD then helped to formulate the set of proposals for a 'New International Economic Order (NIEO).'

As described by political scientist Adom Getachew, the project constituted a distinct form of anti-colonial 'world-making' insofar as it 'envisioned international nondomination as a radical form of economic and political equality between states that would finally overcome the economic dependencies that threatened to undermine postcolonial self-government.' At the economic level, this project often incorporated elements from nominally Marxian thinkers, but its prescriptions were ultimately 'articulated within the terms of a liberal political economy' through which it 'envisioned an egalitarian global economy that required the internationalization of welfarism.'[60] On the international scale, the practical means for realising the NIEO were to be the United Nations itself (and especially UNCTAD) as well as regional associations between newly independent states. Given the existence of the US-dominated Security Council, however, it was unclear how the UN could be reformed to serve this purpose. Meanwhile, disagreements between member nations ensured that the originally envisioned regional associations never materialised – though these early proposals would influence the later formation of institutions such as the East African Community. But the deeper problem was that the fundamentally liberal framework of the project quickly hamstrung any attempts to redistribute wealth or challenge imperial power in any material fashion, all while member nations continued to receive funding from the very multilateral institutions that they criticised.

In Africa, Nyerere was among the most prominent proponents of this project and, although *Ujamaa* emphasised the language of self-reliance, there was a 'sixteen-fold increase in financing from abroad between 1967/8 and 1976/7, nearly all of which was made available for "projects" in the development budget. Without these inflows, the balance of payments deficits of the early

60 Getachew 2019, pp. 144–5.

1970s could not have been sustained.'[61] At the larger scale, these funds were only available because 'the crisis of profitability in First World countries, combined with the inflation of oil rents routinely deposited in Western banks and "extra-territorial" financial markets, created an overabundant liquidity' which was then 'recycled as loan capital on highly favourable terms to Third and Second World countries …'[62] In Tanzania, this meant that debt levels 'rose from less than US$150 million in 1967 to more than $750 million in 1975,' with interest payments only manageable because of earnings on historically high commodities prices.[63]

Similarly, although the ISI strategy was often described in terms of 'delinking,' 'self-reliance,' and state-led 'socialistic' development, its basic mechanisms were deeply dependent on global markets. Though this dependence was supposed to decrease as a domestic manufacturing industry was cultivated, ISI programs never succeeded in this regard. Rather than reducing reliance on foreign imports, these projects 'merely changed the *character* of [low-income-countries'] industrial imports,' shifting them away from the import of finished consumer goods and toward the import of machinery and intermediate goods.[64] Similarly, since the technical requirements of production were now so high and so much of this industrial knowledge was concentrated in firms headquartered in the wealthy countries, ISI policies often required the active participation of multinationals, which were invited by the governments of poorer countries to establish local subsidiaries in exchange for lucrative access to the domestic market behind the tariff wall.

Because of this, low-income countries pursuing ISI policies 'found that they needed to devote increasing quantities of foreign exchange earnings to the payment of licensing fees, as well as to cover the repatriation of multinational's profits.' Altogether, this arguably 'made countries adopting ISI more dependent on trade, rather than less.'[65] Tanzania thereby became a major recipient of foreign funding, all while it 'continued to export the traditional agricultural products, and to use expatriate manpower,' such that, 'by the mid-1970s Western (especially US) influence was considerable.'[66] The NIEO was therefore premised on greater participation in both the global market and multilateral institutions, from within which post-colonial countries could 'stage a political

61 Coulson 2013, p. 236.
62 Arrighi 2002.
63 Coulson 2013, p. 354.
64 Benanav 2015, p. 194.
65 Benanav 2015, pp. 194–5.
66 Coulson 2013, p. 348.

demand for international redistribution.' And this political demand did not in any way challenge the prevailing economic orthodoxy: 'Rather than withdrawing from the relations of structural inequality, post-colonial states could restructure these relations to create a more equitable distribution of both the profit and employment global trade generated.'[67] Thus, the goal was not to escape the international division of labour but to remake it 'into an egalitarian economy that could undo the relations of dependence and secure the economic dimensions of international nondomination.'[68]

The structural adjustment programs imposed by the IMF and World Bank in the wake of the so-called 'Third World Debt Crisis' would therefore come to be seen as a conceited betrayal of the prospect for a truly multipolar and egalitarian international order by the parochial interests of First World policymakers. After all, the impacts were devastating, leading to fiscal insolvency in countries across the Global South. In Latin America, the crisis triggered a 'lost decade.' In Sub-Saharan Africa, it created what Arrighi described as an 'African Tragedy' marked by rising social anomie, widespread political collapse, and a series of new and increasingly violent conflicts – all of which would then be used as justification for the imposition of overt neocolonial policies in the name of 'humanitarian intervention' and 'democratization.' Across the continent, the relative prosperity of the postwar years reached historic heights in the space of a decade and then declined for an entire generation, with many countries worse off by the late 1990s than they had been in the 1960s. In retrospect, the stunted industrialisation drives of the ISI would turn out to be the peak of manufacturing employment rather than the early stages of 'take-off' industrialisation. By the turn of the century, GDP per capita throughout Sub-Saharan Africa was actually lower than it had been 30 years prior. Growth in life expectancy essentially stalled, having increased from around 40 years in 1960 to just under 50 in 1980–2, where it stayed until the year 2000. The same pattern is visible across any number of social metrics. As Arrighi notes, the uneven impact of the crisis thereby marked the point at which the 'Third World' itself fragmented, with the worst economic stagnation and ensuing social breakdown concentrated in Sub-Saharan Africa while former 'Third World' nations in Asia were able to industrialise at rapid rates.[69]

Common critiques of 'neoliberalism' tend to infer that there was another path not taken. In its most extreme forms, the narrative is almost conspiratorial, focusing on the venal policies of the Reagan and Thatcher administra-

67 Getachew 2019, p. 158.
68 Ibid.
69 Arrighi 2002.

tions while paying very little attention to the economic constraints that made these policies (and the politicians associated with them) seem appealing in the first place. However, for governments in the wealthy countries, these policies were not simply incidental cases of 'corporate greed' winning out over civic interest. They were instead attempts to restore growth and maintain the integrity of the global currency in the context of a long, stagflationary crisis that had proven immune to conventional policy responses, including fiscal stimulus.[70] From the viewpoint of government institutions in both rich and poor countries, these were certainly posed as choices over competing policies. But these choices were constrained and conditioned by the deeper imperatives of capitalist production. In Tanzania, for example,

> Nyerere always had genuine difficulty in accepting the IMF's draconian policies … Between 1981 and 1984 there was a prolonged debate in the Party about alternative economic policies – whether to go with structural adjustment and the IMF or to go it alone. This delay led to a further decline in the economy. Faced with no practical alternative from the Party hardliners, Nyerere, after three years trying to get consensus, reluctantly accepted that he had to deal with the IMF.[71]

Ultimately, the theoretical approach of Nyerere and other proponents of the NIEO made the fatal mistake of accepting the alienated appearance of the economy at face value, truly believing that the liberal order is founded on sovereignty, rights, and the efficient-but-imperfect distribution of wealth according to supply and demand.

Within such a framework, it is not immediately apparent why the proper policies needed to even out inequities – and thereby increase the efficiency of the market as distributive mechanism – could not simply be adopted by enlightened leaders. Even if the current generation of leadership proved to be less enlightened, the Fabians had set out a clear strategy for infiltrating state institutions and enacting gradual change. Insofar as social power plays a role in this framework, it is largely distributional. In other words, if social domination

70 In fact, restoring growth also required a wide-ranging restructuring of corporate power within the wealthy countries themselves, privileging a new generation of financial interests, a core of established military-industrial firms, and an emerging cluster of commercial and tech firms in the new sunbelts, all while driving thousands of companies into bankruptcy and liquidating their massive stocks of obsolete fixed capital. (Brenner 2004, pp. 59–89)

71 Fennell 2000.

is understood to operate through unequal exchange and inequitable representation within multilateral institutions, then adopting weighted policies that balance out exchange and governance should allow the market to do its supposed work, efficiently allocating goods to serve human need. Even if this may require militant organising – including armed struggle against the old order – and the willingness to go it alone, if necessary, it ultimately sought to realise the promise of the liberal project, rather than oppose it.

4 Globalisation

Forced to operate within the emerging developmental consensus taking shape around US hegemony, certain elements of both dependency theory and world systems theory would thereby be absorbed into orthodox economics and its affiliated institutions. With their more radical edge dulled and their revolutionary implications domesticated, many of the critiques once levelled against modernisation theory would even be repurposed to aid in its reinvention. The key to this process was the fragmentation of the 'Third World' documented by Arrighi, in which the 'African Tragedy' coexisted with recurrent 'economic miracles' in Asia and the ascent of the majority of countries in Latin America toward their current position in the mezzanine of the global income distribution – albeit secured only after the blood had dried in the coups and civil wars instigated by the US in earlier decades. This diffraction followed two historic apertures in which prospects narrowed: the Third World Debt Crisis, and the collapse of the USSR. Afterwards, it appeared as if the prospects of each region had taken on an autonomous character, with developmental outcomes now determined less by colonisation or proxy conflicts between superpowers than local factors such as the weight of corruption or the cultivation of 'business friendly' policies.

Nonetheless, these divergent trends in each fragment of what was once the Third World were tied together by the rapid growth and increasing integration of world trade – a phenomenon that would soon come to be known as 'globalisation.' The process was easily traceable in the increasing flow of materials through extensive supply chains that channelled unprecedented quantities of mass and energy across the globe. In fact, this diffraction is best understood not as a process of fragmentation but instead composition: the geographic zoning of a sociospheric production complex that now operated at the planetary scale. Thus, while it might seem that Africa was 'left behind' by the emergence of the complex systems of finance, corporate administration, and logistics that made such a dispersal of production possible, it was in fact integral to the process.

After all, in the decades following the Third World Debt Crisis and the end of the Cold War, African oil and minerals (and the labour needed to extract them) became invaluable to the operation of the global economy, enabling the breakneck growth of industrial complexes across Asia and the ensuing booms in real estate and stock markets across the wealthy world.

Some of the best accounts of globalisation were offered by theorists trained, in part, at UDSM. In fact, the modern field of supply chain studies (and even the idea of a 'global commodity chain' itself) can trace its lineage to world-systems theorists like Wallerstein and Arrighi. Ironically, the anti-imperialist critique of postwar developmentalism thereby produced a far more robust theory of industrial modernisation than that of modernisation theorists like Rostow or Lewis. Often, the continuity was quite explicit, as when socialist thinkers adopted liberal forms of dependency theory wholesale. Rodney and Cardoso, for example, merely used conventional Marxist language to reiterate the basic frameworks used by the Latin American structuralists. Other thinkers 'updated' Marx's theory of value so thoroughly that it essentially ceased to operate as a useful explanation of capitalist society at all. Most often, the effective abandonment of the theory of value was disguised within a dubious claim that capitalism had entered some sort of 'new stage' in which its fundamental laws had been transformed – as in the 'monopoly capitalism' thesis formulated by the American Marxists Paul Baran and Paul Sweezy and subsequently adopted by Amin.

In each case, theorists sought to offer alternative forms of political economy rather than elaborate the critique of political economy. As might be expected, this also jettisoned communist politics in favour of more rudimentary forms of socialism, at best, or a subaltern nationalism, at worst. For Arghiri Emmanuel, to take one example, unequal exchange was nothing more than the outcome of the high wages enjoyed by workers in the Global North, themselves set not out of any structural necessity but instead through particular histories of political struggle in which solidarity with the Global South had been abandoned in favour of chauvinistic gain. In these latter accounts, simple algebraic formulas demonstrating the inequitable flow of labour and resources from South to North were often taken at face value and thereby seen to constitute a form of neo-feudal plunder. Theorised as 'imperialist rent,' these approaches essentially sidestepped the deeper question of how value dynamics shape economic space to produce a protean zoning of global production that then appears in the form of unequal exchange.[72] As a result, they consistently failed to predict

72 There nonetheless existed important differences between all of these theories, as well as

the developmental booms that would occur throughout portions of the Global South while also misunderstanding the changing nature of dependency in the areas consigned to further underdevelopment.

World-systems thinkers then sought to overcome the relatively pessimistic and static models that resulted from both liberal and Marxian dependency theorists by framing imperial dynamics within long-run cycles of uneven development that expressed even longer-run shifts in hegemonic power. But this was again accompanied by the abandonment of critical communist theories of value in favour of schema drawn from classical political economy.[73] This shift from dependency to world-systems theory was also conditioned by the emergence of industrial cores in formerly peripheral locations like South Korea and Taiwan, 'since these early instances of industrial takeoff appeared to refute [dependency theory's] insistence that imperialist domination blocked industrial development in the South.'[74] According to Gary Gereffi, director of the Global Value Chains Centre at Duke University and a major figure in modern supply chain studies, the experience of rapid industrialisation in East Asia therefore led to what he characterises as 'a split with traditional world-systems theory' manifest in 'the introduction of the "global" commodity chain perspective in the early 1990s' which centred the role played by lead firms within multinational manufacturing networks rather than that of countries organised according to larger-scale divides between North and South or core and periphery:

> This 'developmentalist turn' in commodity chain research shared with the world-systems framework the notion that mobility is possible as individual countries move up or down between different tiers of the world-

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crucial exceptions, including ongoing debates on unequal exchange and the law of value within Cuba and the work of the exiled Brazilian communist Ruy Mauro Marini. But these exceptions remained mostly marginal, even within the auspices of development theory itself. For a more detailed overview of the differences, see: Smith 2016, pp. 206–23.

73 Despite the theoretical deficiencies and often questionable political strategies advocated by socialist dependency thinkers – especially in regard to the supposedly progressive role of the 'national bourgeoisie' within peripheral countries – their theories had at least retained a political edge. This edge was often visible in the subsequent trajectories of those within the UDSM milieu: Rodney would return to Guyana, where he became active in the revolutionary alliance opposed to the ruling party and was subsequently assassinated; Amin would go on to work in a series of alternative development agencies, serve an advisor to left-leaning governments throughout the Global South, and co-found the Third World Forum in Dakar; former UDSM history professor and prominent political philosopher Ernest Wamba Dia Wamba would become a major rebel leader in the Second Congo War.

74 Smith 2016, p. 207.

> economy. For world-systems theorists, however, this is a zero sum process … Hence, national development as a generalised goal is not deemed possible …[75]

In contrast to this, the global value chain approach put forward by Gereffi and others in the 1990s

> was open to the option that commodity chains do not necessarily reproduce hierarchy and inequality in every case, and it assumed power asymmetries are rooted in the organization of global industries.[76]

In other words, this constituted a revival of modernisation theory's foundational thesis in a new guise. All countries could ensure industrial takeoff and progress through the set sequence of developmental stages, so long as they ensured 'good governance' and adopted policies appropriate to their stage of development.

But this 'global value chains paradigm' also eschewed the determinism of the original theory, which presumed that all countries would inevitably progress through these same stages of development due to universal economic imperatives. Instead, it offered a more pragmatic account, stressing the role of export-oriented production as the fuse for industrial takeoff. Within this schema, development is possible only if poor countries adopt adequate policy measures that both allow transnational capital to exploit their available 'amenities' (namely natural resources and large, young labour forces) through foreign direct investment. This then gives the opportunity (but no guarantee) that domestic firms can build forward- and backward-linkages within these export-oriented supply chains. Crucially, the prospects for industrialisation were understood to depend on local elites (whether policymakers or petty capitalists) effectively marketing their labour and resources to the world's most powerful conglomerates and entering into sub-contracting or rentier relationships with these lead firms.

Nor is there any ambiguity about the political commitments of the global value chains paradigm, at least as represented by figures such as Gereffi. Begun as an exclusively academic endeavour, the institutional support for the framework soon extended to include traditional university sponsorship, foundation funding from wealthy philanthropic organisations, and official support within

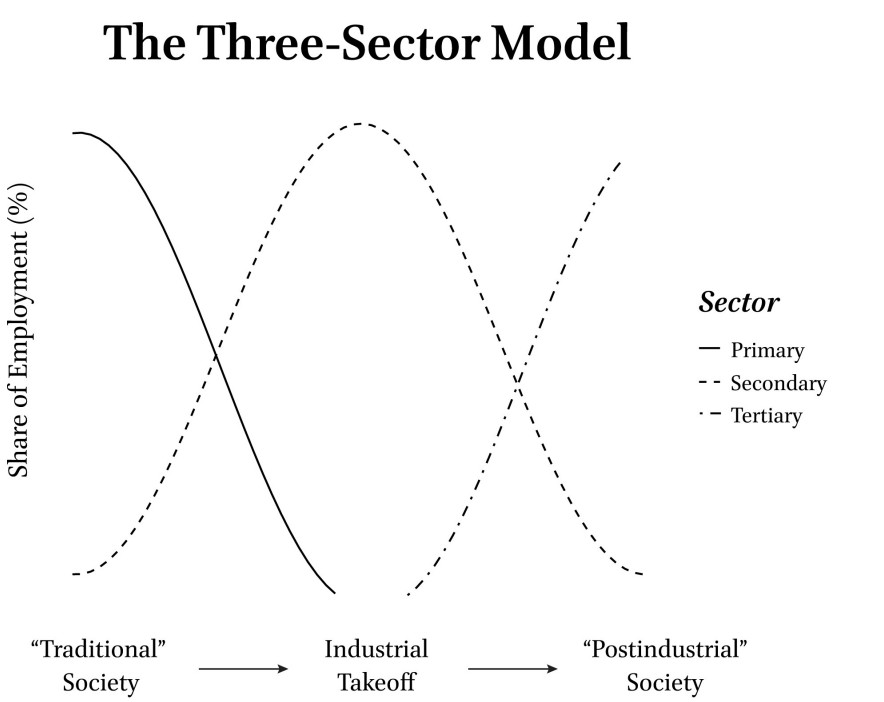
75 Gereffi 2014, p. 14.
76 Gereffi 2014, p. 15.

the auspices of the very multilateral institutions (such as the IMF and World Bank) which were once the focus of dependency and world-systems theorists' most eviscerating critiques. One of the earliest 'Global Value Chains Initiatives' was supported by the Rockefeller Foundation, for example, while the basic conceptual tools of the paradigm are now peppered across more or less every major World Bank report published in the last decade. By the time of the commodities boom in the early 2000s, developmental economics had therefore come full circle. If anything, enthusiastic and self-assured narratives of development were even more prominent than they had been 40 years prior.

5 Proletarianisation without Industrialisation

The orthodoxy of development economics, whether classical or contemporary, is best represented by the 'three-sector' model of structural transformation formulated by the economists Allan Fisher, Colin Clarke, and Jean Fourastié in the 1930s and 1940s, which was then refined by both Lewis and Rostow in the 1950s. In this model (visualised in Figure 30), the entire process of development is simplified to a series of interwoven waves formed by the changing shares of different economic sectors in total employment. The basic pattern is that an initially high share of labour committed to agricultural subsistence (the primary sector) is overtaken by an ascendant wave of industrial employment (secondary), and then industry is overtaken by services (tertiary). Later iterations would generally acknowledge that employment in services composes a relatively higher share from the start and/or tends to move upward more or less alongside employment in industry, as can be seen in the chart of employment shares within the US itself (Figure 31), but the basic character of the model otherwise remains unchanged. The 'dual-sector' model of Lewis and the 'takeoff' narrative of Rostow simply focus in on the early stages of this structural transformation, examining the shift from a 'traditional' rural society where most people work in agriculture to a 'modern' urban economy founded on mass employment in industry.

But these structural shifts also imply major social changes. Historically, the first shift captured in the model constituted the transition to capitalist production as such, with the rising wave of industrial employment preceded by a millennia-long plateau in which most people lived in rural subsistence economies. For this reason, the movement from agriculture to industry and the conversion of peasants to manufacturing workers was widely associated with the proletarianisation process itself – even though proletarianisation occurs whenever a population is forced to depend on the market to survive, regard-



Clarke (1935), Fisher (1940), Fourastié (1949)

FIGURE 30 The Three-sector Model

less of whether they move to cities or are employed in the industrial sector. Lewis therefore emphasised the importance of increasing the productivity of agriculture in staple sectors (rather than cash crops) in order to free up excess labour in the countryside. He also stressed the role of demographic dynamics: Early on in the process, death rates decline, birth rates increase, and the population experiences a boom. Even though the large number of children initially raises the 'dependency ratio' (the ratio of children and elderly to the working-age population), the trend ultimately provides an abundance of cheap labour for urban industry as these children mature and enter the workforce. However, the fertility rate then tends to slow as more of the population moves to the city and the pool of potential workers dries up, ensuring upward pressure on wages and a rising dependency ratio as the workforce ages.

This demographic inflection is usually referred to as the 'Lewis Turning Point' and is generally considered to mark the moment at which 'economic maturity' is reached. Even though the rise of the service sector is not explicit in the dual-sector model, since scarce labour and rising wages encourage fur-

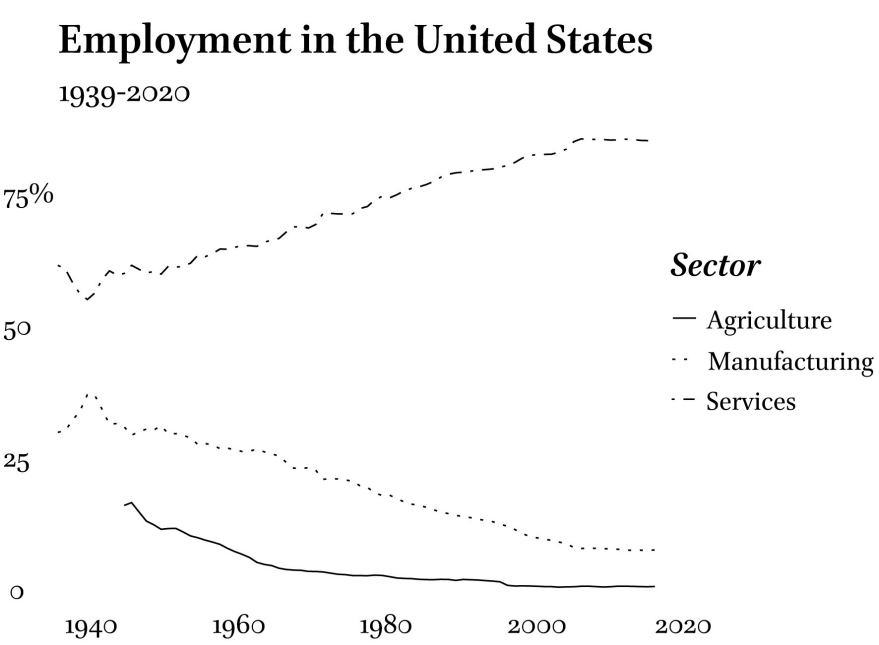
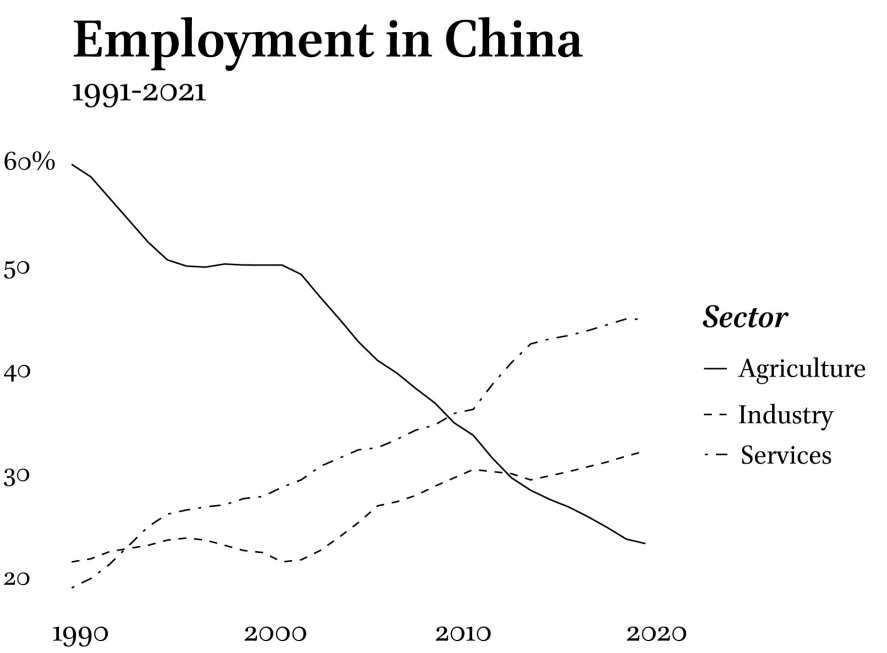


FIGURE 31 Employment in US 1800–1960

ther mechanisation and offshoring, the demographic turning point that Lewis identifies has also traditionally been seen as marking the onset of deindustrialisation. Thus, 'maturity' is often defined by a decline in manufacturing employment, such that most available jobs lie within the broadly defined service sector. But this shift to services is also associated with the emergence of a 'dual labour market.'[77] Most people in a 'mature' economy are employed in lower-wage services – due to the demographic shift, this also often entails an opening of borders to overseas migrant workers – while only a small share are employed in high-wage occupations in finance, administration, insurance, real estate, advertising, and other 'producer service' industries, as well as high-output, low-employment manufacturing (i.e., semiconductors).[78] Economic maturity is therefore accompanied both by growing economic inequality and by a deepening geographic inequity within individual countries, as wealthy

77 Bulow, Jermey I. and Summers, Lawrence H. July 1986 'A Theory of Dual Labour Markets with Application to Industrial Policy, Discrimination, and Keynesian Unemployment', *Journal of Labour Economics*, 4, 3: 376–414.

78 Beyers 1992.



Source: World Bank

FIGURE 32 Employment in China 1991–2021

'global cities' and their exurban satellites diverge from their poorer suburban and rural hinterlands.[79] Despite the local dominance of service-sector occupations in these metropolitan centres, however, they remain major sources of both demand and financing for global industry.

For this reason, the role of foreign direct investment and export-oriented production as drivers of industrialisation have also become central to the orthodox narrative of development, visible in the presumption that the 'flying geese' industrialisation pattern observed in East Asia in the latter twentieth century now represents a general, replicable pattern of structural evolution. Declining agricultural employment alongside rising employment in both industry and services in China over previous decades and, now, in countries like Vietnam, is often used as confirmation of this the three-sector model's continuing validity (see Figures 32 and 33). In this narrative, earlier-developers

79 The 'global cities' concept was popularised by Saskia Sassen (2001). I discuss the role of the hinterland in my book of the same name (Neel 2018). The rise in inequality within countries – despite concurrent decreases in inequality between countries – has been documented in: Blanchard and Rodrick 2021.

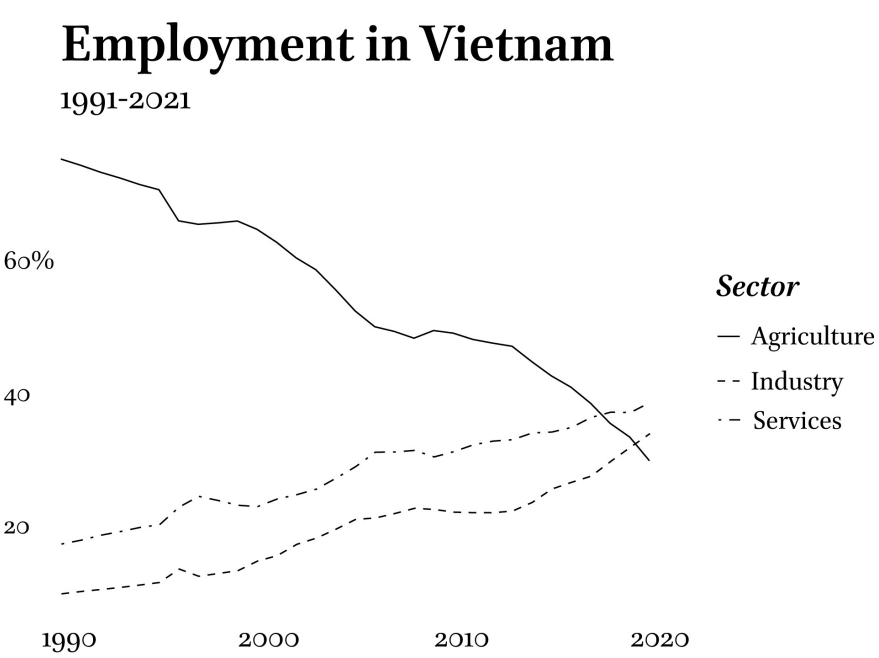


FIGURE 33 Employment in Vietnam 1991–2021

increasingly use their wealth to: a) ascend up the value-chain by investing in new, more hi-tech and heavily mechanised lines of production, cultivating high-end producer services industries and stoking financialisation, all of which results in a decline in manufacturing as a share of total employment; and, b) capitalise industrialisation drives in later-developers, pulled by the relatively lower cost of labour in these locations and pushed by rising costs of land and labour at home. And it is here that the global value chains paradigm has become especially popular, since different supply chain relationships often induce very different structures of territorial development and firm-to-firm linkages.

As the case of Dar es Salaam illustrates, however, neither these new models of modernisation nor the original theories of dependency seem to adequately describe the reshaping of the social and ecological fabric of Sub-Saharan Africa currently underway. In fact, even the 'flying geese' economies deemed to be typical cases prove deceptive. In the terms of the three-sector model, each cluster of later-developers from at least the nineteenth century onward has tended to see an accelerated movement between the first structural shift out of agriculture and into industry and the third, 'mature' passage from industrial employ-

ment to reliance on the service sector.[80] For example, the ascent and peak of industrial employment in the US occurred over the course of almost a century, while the process took just three or four decades in South Korea. And, today, the sequence has accelerated to such an extent that 'developing countries are turning into service economies without having gone through a proper experience of industrialization.'[81] Nor is this merely the experience of a few outliers in the poorest parts of the world: 'With some exceptions, confined largely to Asia, developing countries have experienced falling manufacturing shares in both employment and real value added, especially since the 1980s.'[82]

As documented in the previous chapter, the more recent growth boom in Sub-Saharan Africa was, for the most part, an outcome of rising prices for natural resources associated with the commodities supercycle, driven primarily by industrialisation in China. As the supercycle died down, there was then a second burst of more speculative development in real estate and infrastructure induced by historically low interest rates throughout the latter 2010s, which coincided with even more active outward expansion on the part of Chinese construction and engineering contractors facing a saturated home market. Meanwhile, even in the few parts of the continent where manufacturing output has increased, that increase has not necessarily been accompanied by rising manufacturing employment.[83] The labour-intensive manufacturing that does exist 'is conducted by micro and small enterprises often operating in the informal sector, with little track record of growing out of informality …'[84] And, in terms of trade, 'much of the growth in manufactured exports has been in processed metals, which are essentially raw materials rather than "pure" manufacturing.'[85] Thus, the growth boom is, at best, a 'shadow' industrialisation cast behind the looming commodities bubble. By the late 2020s, Africa as a whole was still 'less industrialised than in the 1970s. Value-added deriving from manufacturing in the past decade (2010) accounted for only 10% of gross GDP compared to almost 15% in 1975.'[86]

Ethiopia is a particularly illustrative example, given its central role in narratives of emerging African developmental states. On the one hand, industrial output in the country has risen rapidly (Figure 34). From a low of just 6.2 percent of

80 The basic pattern is described in: Benanav 2020, pp. 16–22.
81 Rodrik 2015.
82 Ibid.
83 Diao et al. 2021.
84 Carmody et al. 2020, pp. 11–12.
85 Carmody et al. 2020, p. 11.
86 Ibid.

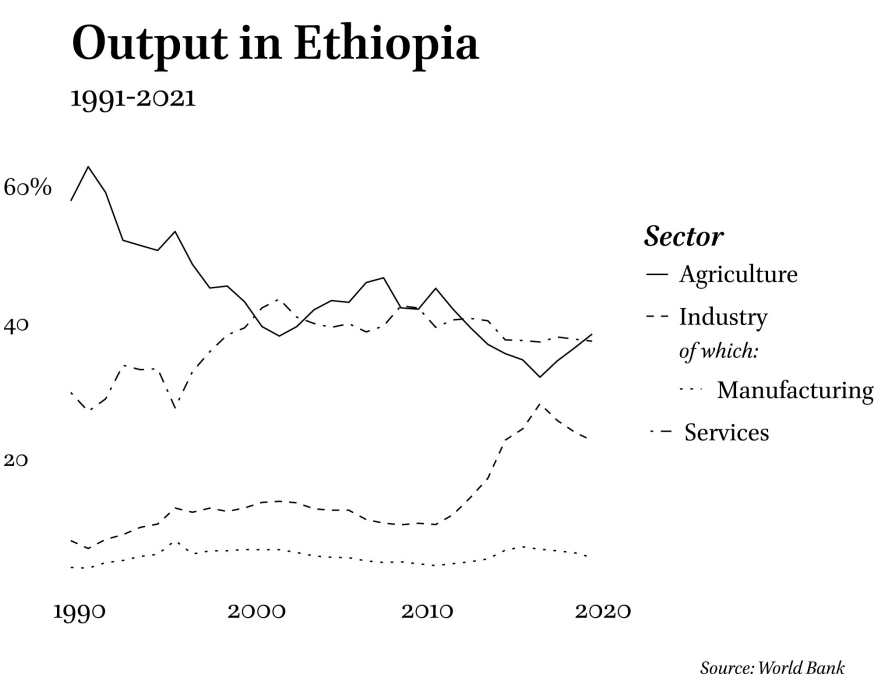


FIGURE 34 Output in Ethiopia, 1991–2022

GDP in 1992, the value added of industry (which includes mining, manufacturing, and construction) rose to 12.9 percent by the mid-2000s, declined slightly after the Great Recession, and then began a rapid climb from 2012 to 2018, when it peaked at 27.3 percent of GDP. On the other hand, much of this growth has been driven by construction, rather than manufacturing.[87] Over those same years, the value added of manufacturing did double from a very low 3 percent of GDP in 1992 to hover around 6 percent by the mid-2000s but, since then, the pattern appears to be largely cyclical. Manufacturing's share declined back to 3 percent in 2012, again doubled to 6 percent in 2017, and then declined over the subsequent years to another low of 4 percent in 2022. Throughout, however, the share of agriculture, forestry, and fishing in GDP has also seen a consistent

87 Mining (mostly gold) is also important, but its contribution to GDP is minimal and, as of 2019, it contributed only about 1 percent of exports. Its importance is instead seen in its impact on informal employment, with artisanal gold mining accounting for significant shares of total employment in certain regions. (EEITI, 'Ethiopian Extractive Industries Transparency Initiative (EEITI) Final Report for Year Ended 7 July 2019', *Ministry of Mines and Petroleum*, January 2021, Addis Ababa. https://eiti.org/sites/default/files/attachments/2019_eeiti_report_final.pdf)

decline, from a peak of 63.8 percent in 1991 to a low of 31.2 percent in 2018 (rising food prices after the pandemic then saw this share increase back to 37.6 percent by 2022). While industry's growing share accounts in part for the decline in the share of agriculture, the growth of service sector output accounts for the bulk of the shift. Tertiary output rose from a trough of 26.8 percent in 1992 to a peak of 42.8 percent in 2008 before declining slightly to around 36 percent for much of the latter 2010s.

But trends in employment only partially match those in output (see Figure 35). Employment in agriculture as a share of the total declines 14 percentage points, from 78 percent in the early 2000s to 64 percent by 2021. But employment in industry only rises 3–4 percentage points over the same period, from between 6–7 percent in the early 2000s to 10 percent in 2021. The majority of the decline in agricultural employment is instead accounted for in the rising share of service sector employment, which increased more than ten percentage points, from a low of 15 percent in the early 2000s to 26 percent by the early 2020s.[88] In other words, roughly two-thirds of the decline in agricultural jobs was made up for by rising employment in services. Moreover, of the one-third that was accounted for by industrial employment, manufacturing composed less than half, with construction making up most of the remainder.[89]

Meanwhile, formal employment has been stagnant or even declined since the 1990s across much of Africa, while informal employment began to increase rapidly alongside the more general boom in economic growth from the year 2000 onward.[90] These conditions are now representative of a global norm wherein countries are jumping from a largely rural economy marked by high levels of subsistence to an increasingly urban and seemingly 'postindustrial' economic base at lower and lower income levels, with shorter and shorter periods of industrialisation in between. Since the population has been proletarianised, it now requires money to survive. Informal employment therefore arises to fill the gap between deagrarianisation and industrialisation. Unlike

88 These figures and the ones below are conventional measures from the World Bank, which sources its employment data from the ILO. The relevant indicators are: value added of agriculture, forestry, and fishing (SL.AGR.EMPL.ZS), value added of industry (NV.IND.TOTL.ZS), value added of manufacturing (NV.IND.MANF.ZS), value added of services (NV.SRV.TOTL.ZS), employment in agriculture (SL.AGR.EMPL.ZS), employment in industry (SL.IND.EMPL.ZS), employment in services (SL.SRV.EMPL.ZS).

89 According to: Tekleselassie, Tsegay Gebrekldan 2021 'The potential of industries without smokestacks to address unemployment: An Ethiopia case study', *Africa Growth Initiative at Brookings*, AGI Working Paper 41, November. p. 18 https://www.brookings.edu/wp-content/uploads/2021/11/21.11.10-Ethiopia-IWOSS_FINAL.pdf

90 Diao et al. 2021, p. 48, Table 2.3a.

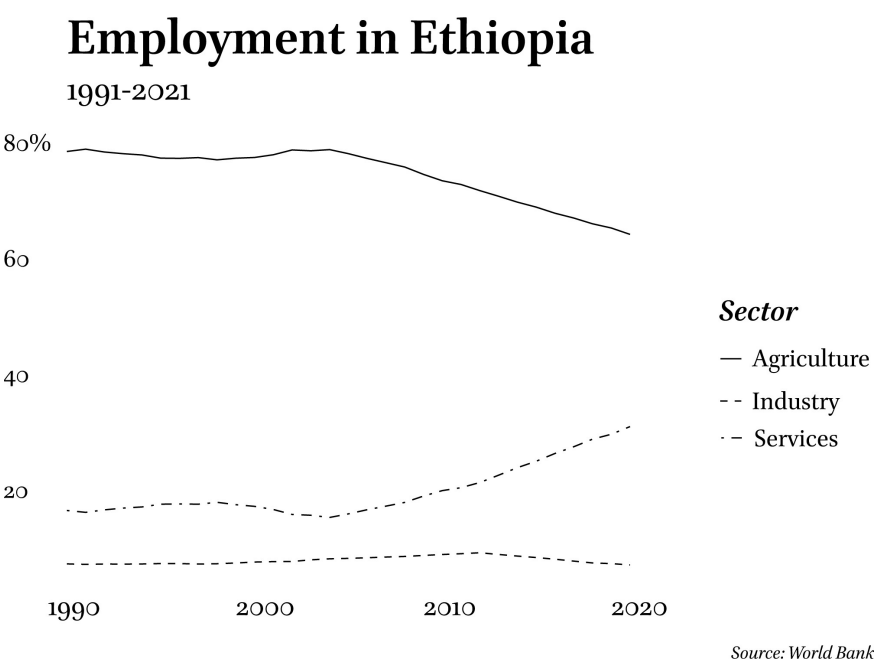


FIGURE 35 Employment in Ethiopia, 1991–2021

the informal industrial enterprises that arose in Taiwan or mainland China, however, the informal sector in much of Africa lacks the sort of linkages with fast-growing export industries necessary for microenterprises to evolve into more formal firms. In terms of the three-sector model, the second employment peak has tended to both flatten and shorten in each new developmental cycle, meaning that the period of high employment in manufacturing (associated with rapid wage growth) is becoming more and more brief. In other words, the three-sector pattern presumed by the model is slowly being truncated into a two-sector shift from agriculture to services and service-like 'artisanal' industries, at least in terms of employment. And the trend has obvious consequences for the overall income distribution as well, since rapid wage growth in the expanding manufacturing sector has, historically, been a major feature of the few periods in which inequality has declined.

6 The Value Basis of Premature Deindustrialisation

From the perspective of the economic orthodoxy, then, this deindustrialisation appears 'premature.' But it is exactly the outcome one would expect as Marx's

'general law of capitalist accumulation' plays out in time. In its most rudimentary form, this law predicts that a progressively larger portion of the population will be made surplus to production by ongoing technical changes within the production process itself. This trend emerges from the basic logic of value itself. For individual firms, rolling out new technologies is simply one aspect of a larger game of strategy and survival within a competitive environment, with success and failure appraised via conventional balance sheet measures of profitability and financial health. Writ large, the process sets a prevailing level of mechanisation and automation within any given product line.[91] This creates a now-familiar paradox: for individual firms, as for individual workers, 'value' is present both everywhere, as the atmospheric mesh of social relationships governing production, and nowhere. Similarly, value is both substantial – literally embodied in the blood and sweat that mark out time in production – and impossible to pin down in any locally measurable material, since it requires retroactive confirmation of its existence through the complex chain of commercial transactions that follow. What is measured in any given case of 'industrial takeoff' is therefore a local sampling (in prices) of landscapes shaped by the planetary flow of value.[92]

Conventional studies of so-called 'premature deindustrialization' nonetheless tend to converge with the communist account in their emphasis on the role of technical change. For Marx, one of the central long-run trends observable within capitalist production is an increase in the 'organic composition of capital,' which is defined by the alignment between the 'value composition' of production and its 'technical composition.' The value composition is the ratio of constant capital (the portion of value locked up in plant and equipment or other forms of fixed investment) to variable capital (the part used for the pur-

91 It is important to note, however, that the prevailing level of mechanisation and automation is not determined by what is technically feasible – it is almost always possible to further automate rudimentary assembly work, for example – but what makes the most financial sense when appraising the combined cost of labour, energy, machinery, etc.

92 Again: value as such only truly exists at the scale of society as a whole, which today is unambiguously planetary. And the 'general law' is a law of value in the sense that apparent and locally measurable dynamics such as individual firm decisions (where to locate production, what technologies to employ) and the ensuing developmental outcomes, are ultimately conditioned by society-wide imperatives that are maybe measurable at that total planetary scale but, locally, make about as much sense to measure as attempting to find the substance of the ecosystem in the organism. Nonetheless, just as we can say the opposite, that the organism is itself the substance of the ecosystem – even if the latter has emergent properties beyond the sum of its organisms that then inveigh on and entrain those organisms – we can conclude that the local experience of labour and proletarian life in general is itself the substantial experience of value.

chase of labour-power). Though this ratio will increase as more value is expended on things like advanced machine systems and more extensive industrial infrastructure, it can also rise if the value of labour itself is cheapened. Similarly, it will differ between regions, between industries, and between firms, such that the average value composition of the total social capital composed from the aggregate of all these individual capitals fixed in place must be understood to have an inherently uneven geography and sectoral distribution. Meanwhile, a rising value composition may not always be accompanied by a general increase in mechanisation, but can also result from more targeted productivity increases in the production of food or other necessary reproductive essentials (the cost of which serve as the baseline for the value of labour-power), from the historic incorporation of cheap sources of labour from areas beyond capitalist production, or from the contemporary use of international labour arbitrage and extra-market subsistence buffers to cheapen labour beyond what would otherwise be possible (what John Smith, following Marx, refers to as 'super-exploitation'). Differential exposure to and incorporation within the accumulation process thereby defines what we think of as the international division of labour.

The technical composition is a more mundane category similar in kind to conventional measures of productivity. According to Marx, it refers to the 'relation between the mass of the means of production employed on the one hand, and the mass of labour necessary for their employment on the other.'[93] The value composition and technical composition are closely correlated – in fact, so closely that Marx usually treats them as essentially synonymous, referring to the combination of the two as simply the 'composition' of capital – but, as the examples above demonstrate, they are not quite identical. Thus, in technical terms, the organic composition of capital is defined by Marx as the value composition 'in so far as it is determined by its technical composition and mirrors the changes in the latter.'[94] Writ large, the value composition and the technical composition of the total social capital move together in this fashion, which is why Marx tends to treat them interchangeably and usually just refers to 'the composition of capital' without further qualifications. Over time, he forecasts that 'a relative diminution of the variable part of capital occurs in the course of the further progress of accumulation and of the concentration accompanying it.'[95]

93 Marx 1973, p. 762.

94 Ibid.

95 Marx 1973, p. 772 (title to section 2 of chapter 25, capitalisation removed).

But the mass of the means of production can increase even while 'their value in comparison with their mass diminishes.'[96] This divide between rising absolute mass also holds for labour itself, since the total number of industrial workers will grow even as it declines in a relative sense – relative in value terms, as the share of variable to constant capital, and in conventional terms, as a share of total employment. In other words, from the very outset, Marx's 'general law of capitalist accumulation' is presented as a theory of the deindustrialisation of employment. Meanwhile, the process is also defined by a transition between the extensive extraction of 'absolute surplus value' in the form of a longer, harder working day imposed on workers (i.e. 'formal subsumption') to the more intensive extraction of 'relative surplus value,' enabled by the process of mechanisation (i.e. 'real subsumption'). Within the conventional economic literature, these shifts are roughly captured by the notion of 'modernization,' and 'developing countries' are those where the shift from 'traditional' forms of handicraft production and seasonal agrarian subsistence to industrial production and rationalised time discipline has been historically stunted.

Although the unity of the value and technical compositions of capital is apparent when appraising capitalist society as a whole or when examining trends in the core of the planetary factory, the unevenness of accumulation also implies that the composition of capital and the ensuing character of exploitation can – in fact, must – differ significantly between regions, sectors, and even individual firms. And the loose systematisation of this unevenness into a fractal hierarchy of power over production is, of course, the defining feature of imperialism. Nonetheless, because of the role played by increasing corporate consolidation in Marx's account of the long-run rise in the organic composition of capital and the uneven distribution of constant capital (and thereby industrial employment), Marxian dependency theorists such as Amin tended to attribute imperial power not to a global rise in relative surplus value induced by technical change but instead to an often-amorphous theory of 'monopoly rents.' This followed from the conclusion of Baran and Sweezy that, by the postwar period, 'competition, which was the predominant form of market relations in nineteenth-century Britain, has ceased to occupy that position …'[97] Competition had instead been replaced by a system of price-setting that allowed for exorbitant arbitrage between the cheapened costs of inputs and the inflated sale price of goods. The basic presumption was that the capitalism critiqued by Marx had been superseded by a qualitatively new 'type' or 'stage' of capitalism

96 Marx 1973, p. 774.

97 Baran and Sweezy 1966, p. 6.

(in their terms, 'monopoly capitalism') that operated according to fundamentally different laws.

Such claims are hardly new, however. In fact, they tend to accompany each new wave of territorial development, seizing on the new financial technologies and methods of corporate organization that accompany each wave to argue that the fundamental laws of the social system have changed. Thus, more than a hundred years ago, similar theories of competition-suppressing monopolisation had already emerged among traditional liberals such as Louis Brandeis, progressives like Thorstein Veblen, and Marxists such as Rudolf Hilferding. Within the historical workers' movement, these 'modernising' interventions have consistently served to stifle theoretical development and help to divert the incendiary potential of mass politics into less threatening avenues – as when American Marxists, increasingly under the influence of Dewey and Veblen, denounced the militant tactics used by the IWW in growing strike waves and even supported the Wilsonian project, including US entry into the war.[98] In reality, however, every new iteration of capitalist society is simply a reiteration of the same fundamental laws within the ever-shifting environment produced by the playing out of these laws in time and space. So long as capitalism exists, these laws do not change. Though thinkers like Amin, Baran, and Sweezy claimed to be examining value at the world scale, then, their theories of imperial power and capitalist underdevelopment largely jettisoned the theory of value in favour of a theory of unevenly distributed rents. The result was the return to a rudimentary model of geopolitical conflict driven by essentially mercantilist dynamics.

There were, however, exceptions. Foremost among them was Ruy Mauro Marini, who formulated an alternate account of dependency more consistent with Marx's theory of value. For Marini, the general rise in the organic composition of capital and increasingly intensive extraction of relative surplus value from the population are both unevenly distributed according to sector and geography. This unevenness therefore sees underdevelopment produced in particular areas as a condition of the development of capitalist society as a whole. The role of agriculture and consumer goods production is central to the process, since 'relative surplus value is … inextricably linked to the devaluation of wage-

98 In fact, almost every major American Marxist followed this path, including the first American translator of *Capital* Ernest Untermann, leading US Marxist theorist Louis Boudin, IWW theorist Austin Lewis, and both Louis Fraina and Morris Hillquit, founders of the American Communist Party and the Socialist Party of America, respectively. The slow bankruptcy of this first school of American Marxists under the influence of pragmatist philosophy and progressive era politics is documented in: Lloyd 1997.

goods,' meaning that the productivity enhancements leading to an increase in the world's food supply (such as those enabled by the green revolution) and the ensuing drop in food prices 'reduce the real value of labour power in the industrial countries,' which then allows 'increases in productivity there to be translated into increasingly higher rates of surplus value' across the system as a whole.[99]

But, because this elevated productivity is achieved only through increased expenditure on constant capital, the increased amount of surplus value and declining value of variable capital is often accompanied by an even faster increase in the value of constant capital and therefore a fall in the rate of profit. This can only be counteracted by further cheapening labour-power without a commensurate increase in the mass of means of production, or by cheapening constant capital itself. Both responses further reinforce dependency, the first by utilising international labour arbitrage, the subsistence buffer, or extreme and brutal (often migrant) labour regimes to drive the cost of labour-power in certain areas below the costs of its reproduction; and the second by cheapening the value of constant capital by driving down the costs of raw materials through similar measures, including the use of militarised conflicts as a means of disciplining labour and eliminating taxation. Thus, 'unequal exchange' is merely the epiphenomenal appearance of the inherently uneven production of relative surplus value.[100] Drawing from Marini, John Smith therefore argues that 'the *source* of imperialist profits and imperial rents is not to be found in any form of monopoly but in *super-exploitaton*,' contra Baran, Sweezy, and the Marxian dependency theorists like Amin.[101]

Insofar as rents enter the picture, they do so not via monopolistic price-setting but in the more conventionally Marxian sense of ground rents derived from landed control over agrarian production and natural resources, with the state often stepping in as the *de facto* landlord negotiating terms of sale and entry into the market. These rents become important precisely because cheapened natural resources provided by regions specialised in their production are a necessary element in driving down the value of constant capital and thereby countering the fall in profitability otherwise induced by the relative cheapening of labour-power. But the effect is seemingly paradoxical insofar as it produces eddies that appear to temporarily reverse the flow of value back toward subordinate elites in poorer countries, since 'raw materials are normally bearers of a surplus-profit existing in the form of ground-rent, and the greater the

99 Marini 2022, pp. 121–2.
100 Marini 2022, pp. 121–9.
101 Smith 2016, p. 230.

relative favourability of the natural conditions in which they are produced, the greater the surplus-profit is,' allowing landed interests in areas with such amenities to effectively appropriate an outsize share of the total social surplus value.[102]

This surplus must then be won back into the hands of capital through both the direct intervention of global mining and agribusiness conglomerates – which either seize these rents outright by becoming *de facto* landlords, or recoup them in the form of their own somewhat extraneous rents, i.e. on equipment sales, seedstock, fertiliser contracts, interest charged on farm credit, intellectual property fees, etc. – and through a complex chain of taxation, financialisation, and state-enforced currency and price differentials that filter these rents out of the hands of the landed elite and back into the flow of the total social capital. Often, lesser landlord interests can even be mobilised against one another in the midst of ongoing military conflicts to allow minerals to simply be smuggled out of the country with few added costs. In each of these examples, capital is effectively able to discipline landed interests through the pervasive operation of the market itself. Meanwhile, the activities and profits of extractive firms hybridise value-producing industrial activity with rentier 'surplus-profits,' such that it is impossible to clearly separate their 'landlord' functions from their 'capitalistic' ones.

Throughout, the struggle over ground rents is a complex and conflictual process that can generate extremely divergent outcomes depending on both the quality of natural amenities and the balance of power in the areas where it unfolds. The Gulf States are, to this day, the only countries that have ever been able to achieve high-income status without passing through a period where a large share of the population was employed in manufacturing. But this was only made possible because the machinations of local rentier interests coincided with those of the major firms backed by the emerging hegemonic power. Much of the class structure in countries like Saudi Arabia over the past 20 years has been defined, then, not by the strength of the national bourgeoisie, but by the distribution of the surplus profits made possible through ground rents to citizens in the form of high wages and expansive welfare programs – excluding, of course, the migrant workers who compose more than a third of the population – and the concentration of these rents within a single, tightly-knit constellation of firms ultimately linked to state-owned Aramco and the Saudi Sovereign Wealth Fund.

102 Caligaris, Gastón, 'The Global Accumulation of Capital and Ground-Rent in "Resource Rich" Countries', in Charnock and Starosta 2016, p. 61.

The role of the national state in the process of appropriating ground rent also generates a certain mystique of development, even in instances where very little industrial expansion is taking place:

> It becomes, therefore, the political subject that appears to create through its direct action a national process of capital accumulation that, according to the magnitude and form of the ground-rent it has at its disposal, more or less resembles one in which industrial capital tends to produce the generality of the commodities consumed in the domestic market. The state's own apparatus thus *appears* in an inverted fashion, as the social subject capable not only of politically representing in a general manner the national process of accumulation, but also of engendering this process by itself.[103]

And this state is, again, always an emanation of class power, constructed in these cases largely by semi-capitalist landlords, various merchant strata, and the lumpen bourgeoisie operating small firms or occupying positions in the military or bureaucracy, all forced into conflictual and compradorial relationships of one type or another with the lead firms and political elites of the 'global cities,' who exert effective control over the market through which these ground rents can be realised.

In Tanzania, Magufuli's reforms in the gas and minerals industries (primarily natural gas, gold and Tanzanite) are a case in point. For large-scale and mostly foreign-funded ventures, mining laws were revised to increase gold royalties (from 4 to 6 percent), the proportion of mandated government ownership in mining ventures was increased, new regulations were passed that required additional processing be performed in-country, and the terms of major deals (namely with Barrick Gold) were renegotiated to increase effective taxation.[104] Meanwhile, the artisanal mining industry was completely overhauled. In the past, this industry had been extremely unregulated and much of the market was effectively illegal. There had also been regular clashes between the security staff patrolling large, formal mining ventures and small-scale miners trespassing on their lands. In previous decades, guards at TanzaniteOne repeatedly

103 Iñigo-Carrera, Juan, 'The General Rate of Profit and its Realisation in the Differentiation of Industrial Capitals', in Charnock and Starosta 2016, pp. 41–2.

104 Scurfield, Thomas and Olan'g, Silas 31 January 2019 'Magufuli Seeks the Right Balance for Tanzania's Mining Fiscal Regime', *Natural Resource Governance Institute*. https://resourcegovernance.org/articles/magufuli-seeks-right-balance-tanzanias-mining-fiscal-regime

shot at and loosed dogs on small-scale miners.[105] One goal of the reforms was simply to modernise state capacity and impose basic regulations on a volatile sector.

Under the new system, the entire Tanzanite industry was therefore reorganised, with the area (Mirerani) where much of the mining and marketing of the mineral is concentrated walled off into a series of monitored fields where artisanal mining was officially licensed. Government trading centres were also established to purchase Tanzanite directly from informal miners at clearly set market prices. Meanwhile, the barrage of minor fees and taxes that small-scale miners had once been subject to – often adding up to some 30 percent of sales – were replaced by a single 7 percent royalty. This system vastly reduced the space for corruption, both increasing formal government revenue and the money that the miners themselves could make.[106] Writ large, this was essentially a method of channelling the appropriation of ground rents back into the hands of the central government, rather than into the hands of local officials or foreign firms. Altogether, the increased tax revenues would then form a reservoir for both direct spending and for acquiring larger loans for developmental projects.

But these ground rents are only possible when natural resources can be extracted to serve demand in the global market. Again, the planetary landscape of value can only be understood at the total social scale, where it is embodied in both an international division of labour and in the uneven distribution of the population made surplus to production entirely – a process that Mike Davis once referred to as the 'triage of humanity,' visible in the warehousing of a vast, un-, under- and informally-employed proletariat in both the forsaken far hinterland and growing urban slums.[107] But, in the wake of the fragmentation of the Third World described by Arrighi, this triage is no longer so easily captured by the old notion of a 'Global South' and 'Global North,' even if the idea still expresses a basic truth. Instead, this older division of labour has today evolved into a 'complex constellation, whereby capital searches worldwide for the most profitable combinations of relative cost and qualities/disciplines resulting from the variegated past histories of the different national fragments of the working class …' producing a fractal landscape in which different specialisations – 'distinctive "material and moral" productive attributes' of labour –

105 Helliesen 2012.

106 Kahn, Jeremy 26 June 2020 'What is tanzanite? It just made this man a millionaire. And it proved African mining reforms can work.' *Fortune*. https://fortune.com/2020/06/26/what-is-tanzanite-africa-mining-millionaires/

107 Davis 2004.

and different degrees of superfluity are unevenly distributed between different countries and across different regions within individual countries.[108]

7 Sub-imperialism and Industrial Involution

Marini also emphasises that this fragmentation is essentially just a further stratification of the imperial order itself: 'What we have is a new hierarchization of the world capitalist economy, based on the redefinition of the international division of labour.'[109] Nor is this hierarchy merely a divide between north and south, centre and periphery, or imperialist nations and the victims of imperialism. The zoning of the international division of labour also sees the emergence of what Marini calls 'sub-imperialism,' in which the more powerful blocs of capital within dependent regions are incentivised to take on crucial subsidiary roles within the overall imperial order as an attempt to claw back more of the value being siphoned into the balance sheets of lead firms in wealthy countries. Often, this involves the oversight of particularly brutal forms of extraction and super-exploitation. In fact, rather than just being an alternative method for categorising the character of different countries, sub-imperialism refers to these specific subsidiary functions themselves – and can therefore be taken on by many different agents.

Sub-imperial stratification therefore also extends into the wealthy countries themselves, where firms and governments in subordinate hinterlands take on much the same role. Such spaces become sacrifice zones host to the dirtiest and ugliest industries – or left fallow, with little legal work at all – and are thereby forced into a form of localised dependency that makes them easy recruiting grounds for imperial ventures abroad. Again, it is hardly a coincidence that the poorest rural regions of the US (largely in the South and Mountain West) also tend to provide the bulk of military recruits.[110] Nor is this a novel phenomenon. In 1950, Bordiga described the continuity between the 'old' and 'new' imperialisms in much the same way:

> Super-rich and prosperous America, looking down from its 1,670-dollar standard of living, promises 350 to countries that are descending step by step to the perhaps 50 of rural China. But the statistics of the States of the Federation are already passing judgement on their much vaunted and

108 Charnock and Starosta 2016, p. 9.
109 Marini 2022, p. 150.
110 See: Neel 2018.

> progressive prosperity. The average of the four least-industrialised falls to 150 dollars: in Tennessee, 137. They're worse off than we Italians! But some sergeant from Tennessee will be sent to colonise Calabria, some Calabrese will be sent to colonise Somalia … An old story.[111]

Bordiga's point is that imperialism *has never* been a simple, Manichean conflict between the nations of the South and those of the North. In fact, the concept of 'a war of poor countries against rich countries … was the Hitler-Mussolini policy' and has always been 'a policy of defeat.'[112]

If anything, rather than direct intervention from the leading imperial powers, sub-imperial forms of enforcement are likely the most common means through which the ongoing production of value is ensured, especially in the global hinterland. It is hardly a coincidence, then, that much of the boom in African trade that occurred alongside the commodities supercycle was visible not in direct exports to the US, Europe, Japan, or even South Korea and Taiwan, but instead in trade within what was once called the 'BRICS' (Brazil-Russia-India-China-South Africa) bloc – which itself proved, in retrospect, to be only a loose classing of subordinate commodities exporters that were themselves orbiting around the boom in Chinese industry.[113] Thus, 'from 2000 to 2014 the value of Africa-BRICS trade rose from US $28 billion to US $377 billion, before falling in 2015 by 21 percent due to the commodity price crash.' The crash itself illustrates that 'the status of subimperialism is fluid' and that not all sub-imperial powers are equal.[114] After all, even at the height of Africa-BRICS trade in 2015, 'India, China, and South Africa accounted for 91%' of the total.[115] Similarly, Chinese demand for raw materials has been so central to global growth that 'exports of extracted and mined resources are becoming

111 Bordiga 2020, pp. 373.

112 Bordiga 2020, pp. 374.

113 'Brazil, Russia, and South Africa are highly dependent on commodities exports, such as grains, crude oil, metals, and ore, with China a major buyer. In turn, exports from China to other BRICS nations are made up of manufactured and semi-manufactured products, creating major trade and financial deficits. A form of the classic North-South manufacturing-commodity function within the international division of labour appears to be reinforced by trade relations among the bloc's members.' (Bond, Patrick, Ana Garcia, Miguel Borba 13 January 2021 'Western Imperialism and the Role of Sub-imperialism in the Global South', *Committee for the Abolition of Illegitimate Debt*. https://www.cadtm.org/Western-Imperialism-and-the-Role-of-Sub-imperialism-in-the-Global-South)

114 Bond, Patrick 25 April 2018 'The BRICS: subimperialism, global governance, accumulation, class struggle and resource extractivism', *Europe Solidaire Sans Frontières*. https://europe-solidaire.org/spip.php?article44546

115 Le Pere, Garth 10 March 2017 'Can Africa Truly Benefit from Global Economic Gov-

more valuable to the broader economic fortunes' of Africa and Latin America, marking a shift that has been referred to as the 'reprimarization' of global capitalism.[116] Although the commodities boom is now over, both rising food prices due to climate change and the shift toward electrification and renewables – again led by China – will only intensify the basic trend over the coming decades.[117]

And the same pattern was visible in the growth of FDI in Africa over the same period, the bulk of which remained concentrated in mining, oil and gas extraction, and other natural resource sectors. Canadian firms have long been major players in this regard, with Toronto the *de facto* capital of the world's mining industry. By the 2010s, the city was home to some 75 percent of major mining multinationals, with '70 percent of the equity capital raised for mining globally … raised in Toronto' in 2012.[118] Of this equity, some 18.5 percent (1.9 billion USD) was raised for projects in Latin America, while another 16.5 percent (1.8 billion USD) was raised for projects in Africa. South African firms (often via London listings) have played a similarly central role in the mining sector and, up until the 2010s, South Africa served as probably the most important sub-imperial power within Sub-Saharan Africa as a whole. But the country's own deepening social and economic crises, and the ascent of China, the Gulf States, and even local intermediaries and tax havens such as Rwanda and Mauritius have gradually eroded its position.

Meanwhile, despite the media blitz about Chinese investment in infrastructure and industry, Chinese firms' FDI in Africa was in fact most heavily concentrated in the oil and minerals sectors. Even construction and utilities composed

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ernance?' *Global Policy*. https://www.globalpolicyjournal.com/blog/10/03/2017/can-africa-truly-benefit-global-economic-governance

116 Cooney 2016.

117 Meanwhile, a new cadre of sub-imperial powers have used the opportunity to increase their role in regional supply chains and geopolitical conflicts. By the early 2020s, this would include renewed interventions by France in the Sahel; increased private equity investment from Israel, alongside trade in arms and minerals; various forms of funding from the Gulf States, especially the UAE, including indirect forms of patronage for conflicts in places like Sudan and the emergence of Dubai as a major hub in the African gold trade; the rise of Egypt and Morrocco as major manufacturers and investors within their respective spheres of influence; and the particularly rapid ascent of Turkish economic, cultural, and military power throughout East Africa and especially in Somalia, including long-term deals for private Turkish companies to operate the Port of Mogadishu and to prospect for oil in Somali waters, as well as a diplomatic agreement that subcontracts Somali coastal security to the Turkish navy.

118 Graham, Stephen, 'Vertical Imperialism: The Technical Lands of Mining Extraction', in Nesbit and Waldheim 2022, p. 158; p. 164.

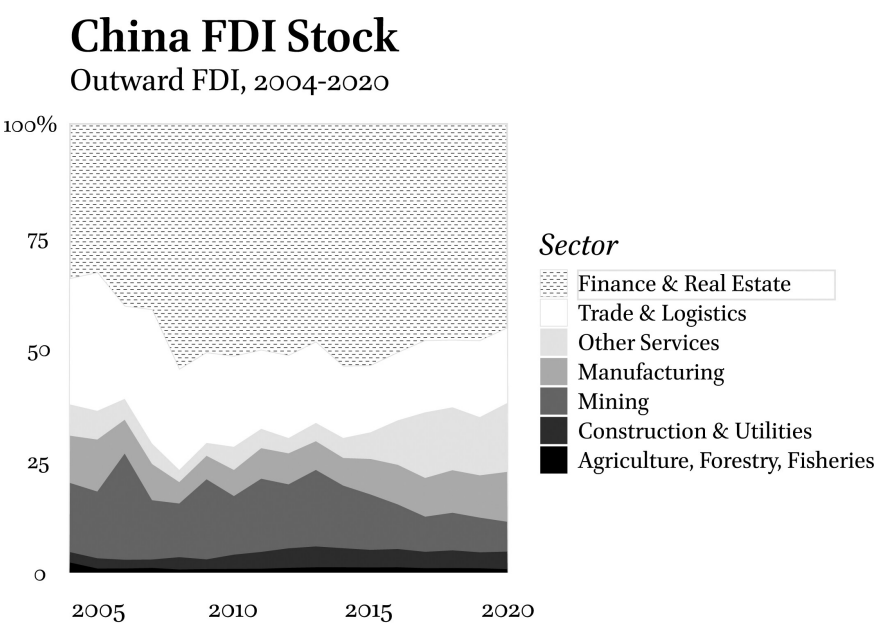


FIGURE 36 Chinese capital stock by sector as share of total (non-financial)

a relatively small share of the total – and the largest of these projects tended to be affiliated with the extractive industries, which required the expansion of electrical grids, ports, and transportation infrastructure. Nor was this unique to Africa. Of China's total global outbound FDI stock, investment in the mining sector constituted a larger share than manufacturing until 2018 (see Figure 36), and the bulk of manufacturing investment has been concentrated in Europe, North America, and Asia, rather than Africa (see Figures 26 and 27, previous chapter). In fact, within Africa as a whole, Chinese capital stock actually peaked in 2018 and has remained relatively stagnant since. In the 2000s, of all outbound FDI from China, investment in Africa outpaced that of the world at large. However, by the mid-2010s, the situation had reversed. By the end of the decade, the growth rate of Chinese investment in Africa hovered near zero while new investment in Asia saw steady growth (see Figure 37). The largest concentrations of Chinese-owned capital stock were in South Africa, the DRC, Zambia, Ethiopia, Nigeria and Angola. Of these, Ethiopia was the sole country that did not rely substantially on revenues from oil or mining – though investments in South Africa and Nigeria were somewhat diversified as well. Moreover, when Chinese capital stock is scaled against the GDP of the host nation (to appraise its relative weight within local production), it becomes abundantly clear that

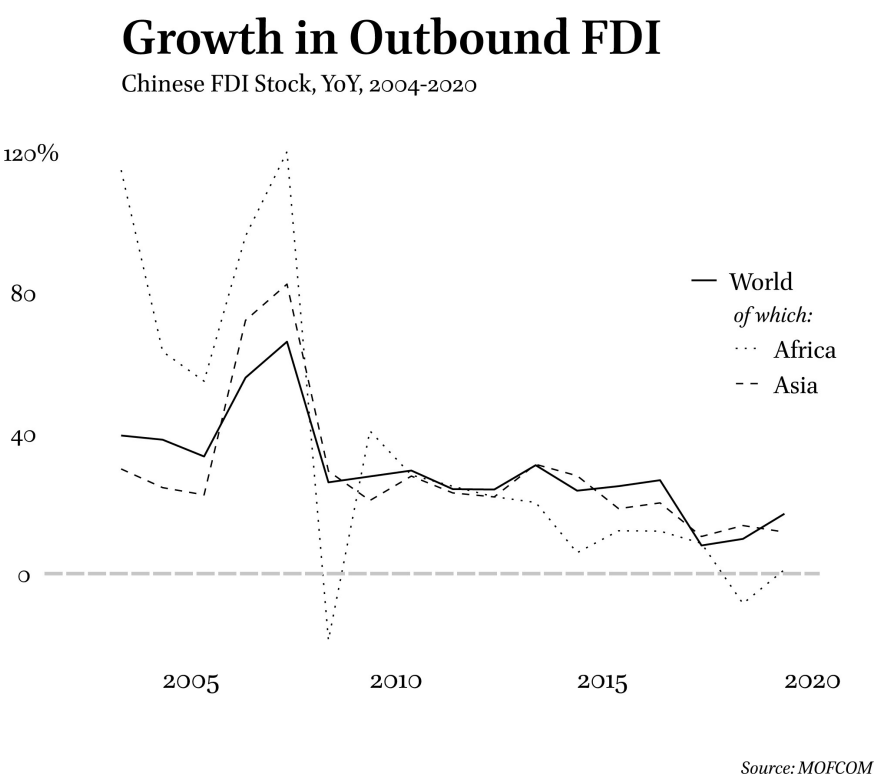
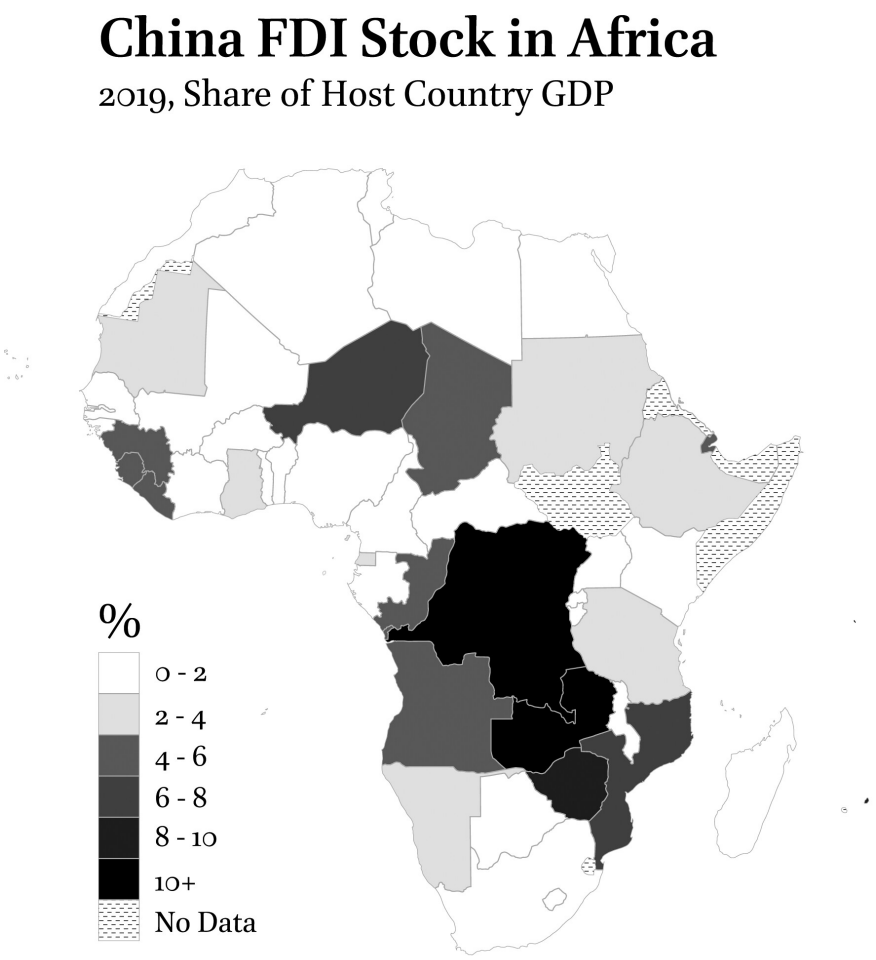


FIGURE 37 Growth rate of capital stock, YoY

the impact of this FDI is strongest in the countries that are most dependent on resource exports, such as Zambia and the DRC (see Map 11). In comparison, Ethiopia, Tanzania, and Kenya barely even register.[119]

But, again, the emphasis placed on Chinese FDI is mostly a mirage. By privileging flimsy geopolitical narratives about rising 'Chinese imperialism' and even a 'New Cold War' between the US and China, the Sinocentric account serves to obscure the more complex stratifications of imperial power at play throughout the continent. Canadian firms are probably the most frequently overlooked. But the rising influence of capital from the Gulf States, Egypt, and Turkey is also becoming an increasingly salient factor in local class conflict.

119 Note that this method compares a stock measure to a flow and is therefore somewhat deceptive in what its figure represents. For example, a figure of 10 percent absolutely does not mean that China owns 10 percent of assets in that country (i.e., this is not FDI Stock divided by Total Capital Stock). Instead, it means that the country would have to use 10



Source: MOFCOM

MAP 11 Chinese FDI stock, share of host country GDP

This is, again, especially visible in mining. For example, in addition to their preexisting prominence within the oil industry, the breakneck growth of construction in the Gulf States has also encouraged their expansion into related sectors: 'The mass engineering of skyscrapers, infrastructure projects, and huge islands has pushed Dubai and the UAE to finance and control global mining, metal refining, quarrying, and aggregate extraction industries,' often through

percent of its annual GDP to buy out all Chinese-owned assets in the given year. These are, nonetheless, unusually large figures.

outright ownership or joint ventures.[120] Dubai-headquartered firms have been especially active in extending control over downstream materials for the aluminium industry such as bauxite (acquiring a series of mines in Guinea, for example), since state-owned Emirates Global Aluminum is among the largest producers of the material in the world. And this has allowed the UAE to begin marketing itself as a regional financial centre as well. As the CEO of a major UAE real estate firm said in 2011: 'Dubai is the New York for Africans now.'[121] Meanwhile, even the seemingly local role of countries like Rwanda in the plundering of resources in the Congo is ultimately an intricate sub-imperial relationship that helps to ensure the cheapening of consumer goods and constant capital worldwide through the supply of low-cost raw materials.

Altogether, then, rapid economic growth in Sub-Saharan Africa from 2000 onward has largely been an extroverted affair driven by market forces and managed by fragmented 'post-developmental' states operating in league with (effectively parastatal) NGOs, international aid agencies, and sub-imperial interests, all tasked with managing a new form of 'development' that effectively deepens marketisation but fails to boost employment or even cohere substantial industrial cores.[122] Perhaps the most important outcome of this process has been a new stratification of Africa itself, loosely mirroring the fragmentation of the Third World described by Arrighi but now operating at an even more granular scale. As a whole, then, recent economic trends on the continent have neither mirrored the export-led growth in East Asia nor retraced the path of the old ISI developmental drives and the stagnation that followed, despite evoking elements of both. Urbanisation is occurring and, at least in the continent's major population centres, the process is now being driven by migration rather than demographic increase. Similarly, industrial output continues to rise in many countries, even while industrial employment stagnates. The trend is mostly due to construction and mining but, in some cases, there has been at least a moderate growth in certain manufacturing lines. Nonetheless, informality has only increased, services have come to dominate employment and, especially after the deflation of the commodities bubble and the shock of the pandemic, declines in poverty have begun to reverse and GDP per capita growth across Sub-Saharan Africa has flatlined.

Across the continent, the extreme extroversion of development and the subsequent bypassing of classic industrialisation is simply the geographic expression of the unevenly distributed rise in the composition of capital at the planet-

120 Stephen Graham, "Vertical Imperialism: The Technical Lands of Mining Extraction" in Nesbit and Waldheim 2022. p. 164.

121 Quoted in Ibid.

122 Neocosmos 2016, p. 383.

ary scale. African countries are simultaneously subject to familiar forms of debt dependency, made into increasingly important producers of raw materials and industrial crops – driving expansions of road, rail, port, and utilities networks designed to facilitate export and further marketisation – and even allowed limited access to heavily capitalised product lines that have relatively high productivity and generate relatively little employment. Conventional accounts of this phenomenon as 'premature' deindustrialisation are not quite wrong, then, they just fail to capture the full picture, and, for this reason, tend to prescribe overly simplistic policy fixes for what is, in fact, a form of inequity etched into the deepest inner workings of planetary production. In these accounts, since firms within poor countries have to compete with whatever the standard price for any given manufacture is on the market, they will be induced to adopt the prevailing production methods for that product line. In this way, poor countries can be said to have effectively '"imported" deindustrialization from the advanced economies' because increased exposure to the global market allowed technical change, overcapacity and the ensuing 'decline in the relative price of manufacturing in the advanced countries [to] put a squeeze on manufacturing everywhere …'[123] Globalisation therefore drives deindustrialisation by 'homogenizing technology around the world.'[124] And this ensures that the labour-intensive forms of production most feasible for smaller-scale domestic capital are simply not profitable within prices set by the global market.

Because of this, much of the handicraft production that persists in countries like Tanzania tends to serve more constrained local markets and to be buffered by various forms of non- or semi-market subsistence. While artisanal mining might seem to be a partial exception, since it produces directly for the global market and provides the vast majority (>95 percent) of employment in the mining sector, it actually contributes a very small share (<10 percent) of total output, with the remainder produced by large-scale, capital-intensive, and mostly foreign-funded firms operating according to the global technological standard. Within manufacturing, the divide is even more pronounced, since handicraft production plays essentially no role in exports – this is the qualitative difference between the informal industrial corridors of Tanzania and the SME clusters of Taiwan – and, with the exception of garments, large-scale manufacturing tends to occur in entirely separate product lines.

Escaping these conditions would require a careful developmentalist balance not unlike that of the original American System or its Chinese successor: tariffs

123 Rodrik 2015, p. 4.
124 Diao et al. 2021, p. 34.

to protect key industries, land tenure reforms to deepen marketisation, ruthless centralisation of federal power over finance to craft a coherent capital market and monetary system that can both unify the interests of the national bourgeoisie and help defend against the onslaught of foreign financiers, and a promotional state capable of marketing local amenities within global trade networks.[125] And yet the size and scale of state intervention necessary to deploy such policies is an expensive luxury for poor countries with low state capacity, requiring extensive programs of mobilisational development to fill in service gaps by deferring costs to local communities as well as autocratic rule by stable political dynasties, which always risk becoming overburdened by the rentier interests of bureaucratic elites or drawn into expensive conflicts between (often ethnicised) interest groups. In the Chinese case (and now also in Vietnam) the basic preconditions for marketisation were therefore set in the long decades of the socialist era, defined by the redistribution of land, the construction of a coherent state machinery, and the massive, mobilisational development of basic industrial and reproductive infrastructure.

From a value-theoretical perspective, what appears as a residual or not-fully-incorporated 'informal economy' is, in fact, the continual reproduction of a surplus proletariat that serves as the social and material substrate of planetary production itself. The process of premature deindustrialisation is therefore better understood as something more like the uneven distribution of the rising organic composition of capital – or, more specifically, of the process of increasing relative surplus value and the ensuing consequences – resulting in a variegated landscape of class in which proletarians in different areas (both in different countries and in different parts of any given country) or composing different demographics (i.e., migrants vs. citizens) are exposed to qualitatively different forms of domination and see their (always collective) productive subjectivity manifest in wildly different degrees of access to productive knowledge.

In places like Tanzania and Kenya, persistent deindustrialisation (from this perspective it is by no means 'premature') is obviously visible in the sheer mass of the surplus population warehoused in both the poor countryside (whether working as small-scale farmers or artisanal miners) and in the *uswahilini* that compose the bulk of the urban environment, while the mutilation of productive subjectivity is evident in the abjection of this population, excluded from hands-on knowledge of technically advanced forms of production – and therefore limited to rudimentary handicrafts if engaging in 'industry' at all – and of

125 These are, essentially, a list of the policies already advocated by major economists who have documented premature deindustrialisation and rising global inequality. For example: Rodrik 2018; Blanchard and Rodrik 2021.

course given only limited access to formal education. Altogether, this is merely the geographically uneven expression of the secular crisis of social reproduction that is the outcome of Marx's 'general law of capitalist accumulation,' encapsulated in the production of a surplus proletariat alongside surplus capital.

The result is that the deployment of labour in such settings is inherently 'involutionary,' both in the modern sense mobilised by Chinese proletarians faced with declining returns in a deindustrialised economy and in much the same sense as the term was originally used by anthropologist Clifford Geertz to describe stagnant per capita returns of rice yields despite rising labour intensity and increased output per area. Though other accounts of agricultural involution emphasised the causal role of population growth in the process, Geertz himself stressed that the external economic demands imposed by the Dutch colonial rulers were an equally important factor.[126] Dar es Salaam and Nairobi are therefore maybe best described as 'involutionary' cities, in which the increasing intensity of labour brought through marketisation seems unable to generate expansive development and instead results in stagnant yields of income that are just above the requirements of bare subsistence, while at the same time enabling a rise in absolute output (of minerals, agricultural products, and a certain share of industrial goods) from the continent as a whole that is largely appropriated by external elites.

At the same time, increasingly powerful local elites are able to profit from rising ground-rents such that, alongside the increase in inequality between countries, every measure of local inequality – whether by income quintile, geographic divergence, or even ethnic difference – also tends to increase. The result is an Africa that is increasingly urbanised but also increasingly enclaved. In Mbembe's terms: an 'atomised capitalism' defined by 'a patchwork, a mosaic of spheres – in short, a diffracted economy' in which a 'multiplicity of economic territories' exist, 'often within the same country, sometimes nested within one another and often disjointed …' and with no 'stable and precise borders, or … clear figures of sovereignty, but rather a complex series of vertical corridors, lateral axes, and networks …' similar in many ways to the economic geography 'that prevailed in the nineteenth century, just prior to colonial conquest and partition.'[127]

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126 Similarly, later applications of the involution hypothesis to imperial China – as in the Huang-Pomeranz debate – stressed both the role of population growth and the role played by in-kind taxation, with production occurring in part to meet the government grain quotas enforced by local elites.

127 Mbembe 2021, pp. 181–2.

8 The City below and the City above

After long days meandering through the industrial districts of Dar es Salaam, the sand of the city would form a crust in the folds of my clothes and from there erode into the collars and quarters of my boots, abrading the skin with its subtle sting. In many ways, the city itself was not so much built as deposited, the sprawl of *uswahilini* a saltation of shifting human settlement rippled into existence as capital coursed over the coastal plain and trickled inward along the old caravan routes toward the mountainous interior of the continent, chasing the cobalt that sings to it from the land around the lakes where it is said the *chitapo* lures men and swallows their shadows.[128] The sand at least reminds you that history is a narrowing hourglass – that many bodies plummeting together flow like something more. But, if you look closely, you also realise that the sand is not simply sand. Today, the streetside dirt in the city is effectively an anthropic sediment, with small granules of plastic visibly mixed in with the salt and stone. Staring out into the Indian Ocean to where motionless containerships knit the mirage of sea and sky into a single burning haze, you might even imagine that these ships themselves are not inbound but instead emptied wrecks dropped like broken toys by errant gods long ago called elsewhere. It is as if the fossilised ruin of the global economy were washed up here, ground at last to nothing more than a geologic residue.

And, in a way, the Swahili Coast has in fact become something like the midden of our civilisation of silicon and hydrocarbons. Waste industries are among the most common lines of business throughout the global hinterland. Since many countries ban the import of garbage outright or at least hazardous materials, much of the industry operates under the banner of 'recyclables.' But exports occur whether or not materials can be reused and, even for those

128 The *chitapo* is a local water spirit recorded in the Lamba-language folklore of the people who inhabit the copperbelt area around what is today Lubumbashi, in the DRC and northern Zambia. Though the spirit has since been somewhat subsumed within the syncretic cult of the serpent-handling mermaid goddess Mami Wata/Mamba Muntu – and thereby been given a number of auspicious powers – the older folklore simply describes the *chitapo* (or *nakamwale*) as 'an evasive, shadow apparition (*chinshwingwa*) or sometimes a whirlwind (*kankungwala*)' or simply treats the entity as a malevolent, often vaguely feminine presence without description. *Chitapo* myths are common around Lake Kashiba (*Kashiba ka Bena Mofya*, Lake of the Entangled Ones) and Lake Namulolobwe, with the translated name of the latter capturing the basic affect: 'She (who) has been concealed (or lost) within.' Notably, the *chitapo* is said to use baskets, mats, and other goods floating in the water to lure people (usually men) to the shore where they can be drowned. (Siegel 2008).

that are technically recoverable, the recycling process itself is often highly toxic. China had long been the leading importer of plastic waste, bolstering its position as the largest plastics producer in the world. But the industry's environmental impact led to a ban in 2017. Afterwards, the total flow of plastic waste plunged. For several years, most plastics dropped into recycling bins in the wealthy countries simply diverted to local landfills. As the global industry reoriented, however, the flow gradually shifted to Southeast Asia, where it was accommodated by growth in the broader petrochemicals sector.[129]

But an important sideline of low-end plastics recycling also emerged in East Africa in these same years, since urbanisation and increased market dependence have also seen a rapid increase in the demand for the sort of simple plastic goods that can be produced by rudimentary recycling processes. For example, woven sacks and shopping bags, slippers, and even plastic-infused building materials have all become common manufactures within industrial districts in cities like Dar es Salaam, Nairobi, and Kampala. Increased consumption has also meant increased import of things like plastic bags and plastic bottles, with the collection of discarded plastics a common form of employment within the informal economy.[130] When countries like Kenya then banned the use, import and production of single-use plastic bags, this only further stimulated the local production of reusable bags woven together from plastic waste. Every few years, there emerges a new feel-good media story featuring innovative African entrepreneurs who have figured out a way to turn this plastic waste into some novel consumable, ranging from plastic bricks that can be used in construction to desks for schoolchildren.[131]

Given their experience within the industry, Chinese firms became important players in plastics recycling throughout the region. Within Tanzania, surveys conducted in the latter-2010s found plastics recycling to be among the main product lines for Chinese manufacturers. According to one such survey, conducted in 2017 and 2018,

> about sixty Chinese factories are engaging in plastic recycling, granulation, and the manufacturing of a variety of plastic products in Tanzania. Twenty-five to thirty of them are producing plastic woven sacks and shopping bags using locally recycled materials, and another five plants are

129 Wen et al. 2021.

130 Jambeck et al. 2018.

131 World Bio July 2023 'East Africa's burgeoning circular plastics sector needs more capital', *World Bio Market Insights*. https://worldbiomarketinsights.com/east-africas-burgeoning-circular-plastics-sector-needs-more-capital/

> concentrating in granulation … About another ten Chinese companies are engaging in the manufacturing of plastic slippers, targeting the local and regional markets. Except for plastic slipper manufacturers, which mainly use imported raw materials and occasionally production waste, most Chinese plastic factories use locally recycled waste plastics.[132]

By the time of my own survey in 2020, the anti-corruption crackdowns, plastics bans, and more general decline in the commodities bubble had seen a number of these Chinese producers shut down, but granulation plants and small-scale manufacture of things like reusable bags remained among the most common activities engaged in by Chinese firms.

According to that same survey, the firms that had shut down were mostly those 'focusing on recycling polyethylene terephalate [*sic*] (PET) bottles and exporting plastic flakes to China …'[133] And this was visible in every aspect of the urban environment: in the *uswahilini*, little mounds of single-use bottles gathered from the area by locals ran along the alleys like veins of blue ore peaking up through the sand; markets like Kariakoo were essentially woven together with the material, which made up tarps, shopping bags, vegetable sacks, and even the shoes people wore as they pushed through the crush of bodies; and of course the soil and water around the recycling facilities were flecked with pale plastic granules picked up by the wind or shed from the clothing of workers heading in and out.

Not only are plastics a crucial constituent of the urban fabric in a city like Dar es Salaam, then, but they also elucidate the basic logic of extraverted development itself. This logic appears, on the surface, as a series of paradoxes or divergences from the expected model: stagnant industrial employment despite both rising industrial output and rising merchandise exports, general underdevelopment of the housing market despite the speculative overdevelopment of real estate, and of course the fact that the areas host to resources that are central to the modern economy remain peripheral within that very economy. Altogether, these features combine to produce what seems to be an entirely unsustainable 'overurbanization,' destined to do little more than concentrate an increasingly young and volatile proletariat in sprawling slums. But these trends make perfect sense when we see the process of urbanisation as the construction of a particular valuescape serving the needs of accumulation above and beyond those of the people through whom value accumulates.

132 Xia 2019b.
133 Ibid.

Elsewhere, capital must cultivate the 'moral and material' needs of the population on which it relies, at least to a certain degree – visible in the form of both a rising 'consumption fund' and in the development of social-reproductive infrastructures for health, housing, education, etc. But, in the far hinterland of accumulation, even this is often unnecessary. Capital is therefore free to plunder the consumption fund itself while also perpetuating and enforcing the proletarian condition, simultaneously marketising reproductive activities and ensuring that the entire range of subsistence industries is underpaid and sometimes not remunerated at all.[134] In both senses, this is therefore a continuation of primitive accumulation *not* as 'accumulation by dispossession' – in which a secret subsidy of surplus wealth is funnelled into the coffers of the corporations – but as *permanent* accumulation, establishing the baseline conditions for the further intensification of relative surplus value at the global scale and the reproduction of capitalist society as a whole.[135]

For all of these reasons, it no longer quite makes sense to speak of any given process of urban construction as something driven primarily by local, national, or even regional forces, but instead as part of the larger phenomenon of 'planetary urbanization.'[136] Individual urban booms are therefore more like gravitational points warping the technical fabric of an 'urban society' that already spans the world. And this is not simply reiterating the fact that, sometime just after the turn of the century (possibly 2006 or 2007), the majority of the world's population lived in cities of some sort. More than this: rather than a clear divide between city and country or, internationally, between (urban) centre and (rural) periphery, we find instead a continuum within which traditional features of urbanisation – high densities of human population and technical installations, elevated energy use, massive infrastructural substrata, and rapid, long-distance transportation of bodies, artifacts, and unrefined material – are now so thoroughly distributed in space that even the far-off and seemingly 'natural' territories of the countryside are functionally part of the built environment. At the same time, the planetary nature of this process also means that each individual territorial agglomeration is tightly woven into the sociotechnical fabric of the planet, with a city like Dar es Salaam literally constituted by world-spanning forces that draw mass to and through it. And, since this urban society is a specifically capitalist one, these forces also effectively sculpt social domination into built space.

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134 For a detailed overview of the history of debates on the nature of accumulation and the plundering of the consumption fund in Africa, see: Shivji 2019.

135 See: Bonefeld 2001.

136 Brenner 2015.

With this in mind, the very infrastructural projects that seem to constitute 'development' in a city like Dar es Salaam take on a very different character. There is no doubt that such projects have contributed to rapid growth in GDP and the achievement of lower-middle-income status in Tanzania as a whole. But such income rankings are mathematical fictions, tracking output per capita but not the actual distribution of income across the population. By comparison, poverty reduction has been substantially slower. According to international poverty measures – which tend to overstate poverty reductions – there has been only moderate progress since the turn of the century. Between 2000 and 2018, annual GDP growth in Tanzania averaged some 6.3 percent. By contrast some 26 percent of the population still fell under the national poverty line in 2018 (down from roughly 34 percent in the early 2000s), nearly 50 percent under the international poverty line, and 60 percent in more accurate, multidimensional poverty measures that include factors like nutrition.[137] The growth elasticity of poverty also dropped from an already low -1.02 in the years 2007–12 to a mere -.45 in 2012–18, meaning that, by the latter period, even a 10 percent increase in GDP would only be associated with a 4.5 percent decrease in poverty. By comparison: the average growth elasticity of poverty in poor countries is closer to -2, meaning that a 10 percent increase in GDP should bring a 20 percent decrease in the poverty rate.[138]

Essentially all the poverty reduction that did occur in these years happened in the countryside. Despite the massive build-out of Dar es Salaam's skyscrapers and road systems, urban poverty saw no reduction whatsoever. Meanwhile, population growth ensured that the total number of poor nonetheless increased from 12.3 million in 2011–12 (according to the national poverty line) to 14 million by 2018 (or 26 million, according to the international measure). And, throughout the decade, there was essentially no growth in median income (increasing by a mere .11 percent). Similarly, the same years saw only a minor annualised increase in consumption growth (.92 percent). Among the bottom 40 percent of the population, consumption actually decreased slightly (-.15 percent) and the Gini coefficient rose from 38 percent to 40.5 percent, placing Tanzania roughly on par with the US in terms of inequality.[139]

137 Swinkels, Rob 2021 'Poverty & Equity Brief: Tanzania', *World Bank Group*; World Bank 2020, 'Tanzania: Mainland Poverty Assessment: Executive Summary', *World Bank Group*.

138 Ravallion, Martin August 2022 'Growth Elasticities of Poverty Reduction', *NBER Working Paper Series*, Working Paper 30401. https://www.nber.org/system/files/working_papers/w30401/w30401.pdf

139 Swinkels, Rob 2021 'Poverty & Equity Brief: Tanzania', *World Bank Group*; World Bank 2020, 'Tanzania: Mainland Poverty Assessment: Executive Summary', *World Bank Group*.

In a more concrete sense, then, we should understand the build-out of Dar es Salaam and even East Africa more generally as the extension of an immediately 'global infrastructure' designed first and foremost to serve the imperatives of planetary production. Subsequent impacts on what the UN has taken to calling 'human development' are mostly ancillary.[140] Dar es Salaam is not so much experiencing demographic urbanisation – though locally high fertility rates have been the cause of most urban growth in Sub-Saharan African cities since the 1980s – nor urbanisation founded on the traditional pairing of in-migration and industrialisation, but instead something more like an 'infra-urbanization,' in which the technical exoskeleton of the city develops as a sort of hollow shell. All the scaffolding of accumulation is present, but there are few of the 'forward and backward linkages' so popular in supply chain theories to connect this scaffolding to the demographic space it encircles.

The poor are simply left to survive however they can, looking up now and then from the horizontal sprawl of the slums toward the dark hum of accumulation churning above. At most they might sell knick-knacks or simple services to those better able to traverse these global networks – local elites, tourists from the wealthy countries, stray grad students employed by universities whose operating revenues are larger than the GDP of Burundi. Or maybe they can gather some of the waste that rains down from these infrastructural systems, reselling donated clothes in a *mitumba* market or gathering up plastic bottles to bring to the processing centre. And yet, despite this stark separation, such activities nonetheless symbolise the more general subsumption of these slums within a singular capitalist society, rather than their outright exclusion from 'the economy' as such. After all, the very infusion of waste materials like plastics into the physical environment seems to carry a deeper import. These granules and fabrics and foams are, in a way, the very substance of the material community of capital. And such sediments are only animated – only drawn here, deposited here, sunk into the water and into the blood of these people and not others – by the spectral force of certain social relations.

Once, when surveying the industrial stretch in Mikocheni, I came upon a Chinese-owned plant manufacturing these plastic granules. There was nothing particularly exceptional about it, and I didn't expect to be allowed into the facility – though by then I'd become accustomed to workers talking at length

140 This is not to say that there is no earnest interest among local elites in raising income levels or fostering consumption, only that such projects are forced to operate largely through the administration of ground-rents. Any more expansive developmental project will require the emergence of a far more robust domestic bourgeoisie with a material interest in exploiting the region's abundant labour surplus.

with me and even inviting me inside various factories and warehouses, whether or not I asked. Similarly, guards and managers at other companies had happily answered questions and provided contact information for higher-ups, even if they then politely refused me entry. But, in retrospect, the Mikocheni plant was a strange experience, out of keeping with all my other factory visits.

As I walked toward the facility through a labyrinth of parked vehicles, broken wood, and bundled plastic pellets toward a group of drivers and guards near the gates, I had the feeling of having interrupted some sensitive conversation. Voices gave way to a tenuous silence. I greeted the group and asked my normal questions, but the drivers standing outside waiting to load were reticent. The two guards then approached, both Maasai (commonly employed in such work) each visibly armed with their *seme* (short-swords) sheathed in rawhide at the hip. One had a deep series of scars cutting across his face and the other had been half-blinded, one eye marble-white and sightless. When I greeted them, they were silent. Given the generally conversational ambience of social interaction in Tanzania, this alone was unnerving. I simply smiled, explaining who I was and what I was doing. When I tried to look into the facility beyond the open gate, I only caught a brief glimpse before the guards closed rank. I didn't press any further. As we stood there and I continued to try to elicit some response, I sensed the slightest muscular tension – not movement so much as the subtle intent of stance and hand placement familiar to any fighter. I smiled, thanked them, and backed away. Plastic pellets crunched in the sand, scattered there as if they had been melted in the heat of the far-off sun and then cooled to a hail as they rained down onto the coastal plain.

All said, the interaction was minor, and lasted only a few minutes. But the strange and threatening aura of the scene grew as my memory of the exact details wore thin, as if I had not simply interrupted some illicit business but had instead approached some forbidden, eschatological space that annihilates gaze and memory. When I try to remember exactly what I glimpsed inside the factory, I can only bring to mind the brightness of the sun above and the heat pelting down from it, as if the coral-white walls were filled not with the stink of diesel generators, the hum of conveyor belts, and the pale mush of reforged plastic but instead with a pure fission of molten light – the very forge of the gods of industry, long hidden from humankind and forbidden to be gazed upon by all but a privileged few. Of course, this was just a minor factory doing its minor business in a minor industrial district. Perhaps by avoiding the crackdown, the facility was operating illegally. And these were just wary guards who did not want some foreigner getting them in trouble. After all, this was a beleaguered line of work, subject to sudden policy shifts and unwanted oversight. Symbols, however, always grow back over disenchanted banalities, like moss creeping

over windswept stone. So, even though this was obviously a matter-of-fact place in a matter-of-fact city just like the ones you or I inhabit in our daily lives, it was also maybe something more. We might imagine it as something like a sliver of the absolute puncturing the profane, the barred gates of some heaven lost here in the sand that birthed the human species: a place that was once the very edge of capitalist society, and is now again its beginning.

CHAPTER 12

Hill of Ash

From its earliest recorded history exporting Lebanese timber to Protodynastic Egypt, to the peak of its Roman prosperity as a major transshipment centre for the frankincense trade, the city of Gaza once sat near the centre of Levantine civilisation. Perfumed with incense, spice, and cedar, the thin threads of commerce that met in its small harbour helped to weave together the ancient societies of Mesopotamia, the Mediterranean, and even India, much as the deepwater container hubs in cities like Hong Kong and Dar es Salaam anchor the movement of mass across the mesh of the world market today. Then, as now, the shuttling of materials across the surface of the planet composed a sort of carapace for the social forms coursing through them. And, after the decline and gradual decomposition of the societies that crafted these material cultures, their exoskeleton of artifacts would remain encrusted in the arid soil of the desert, serving as fossilised remnants of the social forces that built them. In the archaeology of the region, perhaps the most important of these early encrustations are sites referred to as 'tells,' which are layered mounds formed through continuous generations of urban settlement, essentially areas where the social agglomeration of mass outpaced its loss through erosion for sustained periods of time. Among the oldest of these archaeological settlements in what is now the Gaza strip is an Early Bronze Age site called Tell es-Sakan, or the 'Hill of Ash,' dated back to at least 3300 BCE. The name derives from the large quantity of the calcium compounds associated with combustion found during its early excavations, indicating that it was burned to the ground prior to being abandoned.

Though the razing of the city may have been due to some natural disaster, it also appears to align with a local civilisational collapse that occurred in the area around 2200 BCE, during which the population 'abandoned their walled cities, dispersed and underwent pastoralisation.'[1] When sedentary agriculture and urbanisation were revived in the region some four or five hundred years later, settlement had shifted to an urban centre at Tell al-Ajjul, slightly closer to the centre of modern-day Gaza. From what little we know, it seems that the destruction of the final settlement at Tell es-Sakan and its subsequent abandonment was the product of a sudden climatic warming in early antiquity that

1 Bieniada 2016.

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bloomed into a regional war on the peripheries of the major powers centred in Egypt and Mesopotamia.[2] The sequence therefore offers a grim premonition of the present, insofar as this warming period was triggered by a significant weakening of the Atlantic meridional overturning circulation (AMOC) system, which is today undergoing a similar decline – some even forecast its outright collapse by the middle of the century.[3] Known as the '4.2 kiloyear BP aridification event,' the warming coincided with cyclical climatic shifts (the Bond cycle) but also extended for far longer than average. As rainfall declined and agricultural land was subject to sustained drought, proliferating conflicts saw fields, forts, and cities razed throughout the region, eroding the material basis of agrarian power on the periphery of the earliest empires in recorded history and leaving behind only small, geographically distributed bands of humans living in the wreckage. But the collapse that began at the edges eventually moved inward. Soon, increasing aridification had salted the water sources of the Akkadian Empire, making it susceptible to foreign invasion and prone to internal conflicts.[4] At its height, the extended drought even halted the flooding of the Nile, triggering a series of escalating famines that contributed to the end of the Old Kingdom in Egypt.[5]

This interpretation is, of course, also something of a contemporary bias, etching present conflicts into the distant past. Because the truth is simply that, today, we can't help but read even this distant archaeological record with a sense of foreboding. History winds in on itself. Tell es-Sakan was burned to the ground and abandoned by 2300 BCE. By the end of the year 2023 CE, much of the modern city of Gaza had been reduced to rubble more systematically than any urban territory since the bombing campaigns of World War II, which once made Stalingrad synonymous with the image of urbicide – and, of course, also with a maddened, genocidal campaign of conquest that ultimately crucified itself in that very rubble as officers were picked off by snipers hiding in the corpse of the city they had killed.[6] Though the Tell es-Sakan archaeological site was destroyed by Hamas in 2017, the ancient Hill of Ash seems now to have

2 Nor was this a limited, regional phenomenon. The same warming is also hypothesized to have played a role in the decline of the Indus Valley Civilisation and the collapse of both the Longshan and Liangzhu cultures in mainland East Asia.

3 The IPCC, following conservative assumptions, predicts sustained weakening of the AMOC over the next century. For one of many recent scientific studies predicting outright collapse, see: Ditlevsen and Ditlevsen 2023.

4 Cullen et al. 2000.

5 Stanley et al. 2003.

6 For an overview of the physical destruction of the city, see: Debre, Isabel 23 November 2023 'Gaza has become a moonscape in war. When the battles stop, many fear it will remain unin-

been meticulously reconstructed in a horrifyingly modern form by the Israeli war machine. The goal of the military campaign is, unambiguously, the flattening and depopulation of most of the Gaza Strip through some combination of aerial bombardment, mass slaughter, and the deportation of any survivors – in other words, a textbook case of ethnic cleansing. This is, of course, an atrocity.[7] For many observers, though, this genocidal escalation of the long-standing conflict seems to carry with it broader implications, signalling systemic tensions within the megastructures of capitalist civilisation that, when placed in their global context, forebode some sort of epochal shift, much as the razing of Tell es-Sakan may have marked some intractable crisis within the societies of the Early Bronze Age.

In this sense, the warscape of Gaza is not an isolated event but serves instead as a sort of social hieroglyphic conveying the intuition that we lie on the precipice of some terrible transformation yet to come. The horror of an already horrible war is thereby amplified by more inscrutable horrors lurking in the world's future. We might, therefore, express it in the language of the genre: 'We feel like something bad is going to happen to us. We feel like something bad has happened. It hasn't reached us yet but it's on its way.' In other words, everyone, everywhere senses that something is very wrong and that someone, somewhere, is to blame, but we also all feel powerless to enact any sort of justice or retribution, and therefore seem doomed to simply watch it wash over us in despair – to invite it, even, performing the very daily tasks that will summon this destruction toward us because we have no other choice. And this sense is especially strong among the youth whose lives, illuminated by what seems now to be the great carboniferous bonfire of human history, stretch forward like a dimming shadow into an unseen future that nonetheless echoes back the sounds of ripping flesh and gnashing teeth.

The warscape offers no concrete prophecy, invoking only the vague sense that more wars are coming. And this doom permeates other features of everyday life in lesser measure. The same dread is felt when you look at your weekly check of a few hundred dollars and feel the math narrow with every month of rising rent. Or when your basement apartment floods under each year's new record rainfall. And, of course, when you get home from a night shift and your

habitable', *Associated Press*. https://apnews.com/article/palestinians-gaza-israel-bombing-destruction-hamas-reconstruction-f299a28410b70ee05dd764df97d8d3a0

7 It has been named as such even in the language of elite governance – that of 'human rights' and 'international law' – with South Africa filing claims of genocide against Israel with the International Court of Justice, which then failed to order a ceasefire in its interim ruling and instead issued a series of vague and unenforceable human rights directives.

body is in that peculiar state of overexcited exhaustion, so you doomscroll, reading about Gaza, about some new right-wing regime rising to power, or about scientists predicting mass deaths this summer or next when heatwaves begin to exceed the 'wet bulb' temperature. Any rebellion seeking to make the world a better place is promptly crushed. You can only watch as the rebels are massacred, and the remainder imprisoned or cast into exile. And, in the background, friends and family post GoFundMe links for life-saving surgeries, all of which fall short like a stone hurled into the buffeting wind of some approaching storm.

1 Polycrisis

Taken together, we might simply think of this as a widely shared intuition that society will collapse under the strain of environmental catastrophe, economic disfunction, and the self-interested struggles of venal elites trailing armies behind them. After all, Gaza is but one of several ongoing wars occurring in the midst of a more general increase in violent conflict. Since many of these conflicts are quite obviously linked to climate change, declining economic prospects, and the spectre of newer, deadlier pandemics, conventional economics has now taken to referring to these basic conditions as a 'polycrisis,' a term popularised at the 2023 World Economic Forum in Davos.[8]

The approach here is essentially agglomerative: various local crises playing out in their own respective spheres with their own distinctive causes accumulate and grow at such a rate that they begin to intersect, linkages sprouting from each to touch the others in a massive graph-structure of interlocking accidents. The schema is fundamentally eclectic and exclusively horizontal. Though there may be arcs connecting one nodal crisis to another and some may be more severe or widespread, none is more conceptually fundamental than the others and there is not any single social logic undergirding all. In other words, rather than a theoretical model, polycrisis is a mostly empirical concept that divides out individual dynamics according to common-sense categories drawn from the prevailing ideological environment (i.e., their alienated appearance). As a result, the promoters of the idea do not offer any general theory of crisis within capitalist society – nor of social crises in general, or even of 'ecological' crisis as the executioner of civilisations – so much as a collection of partial theories of

8 Whiting, Kate and Park, HyoJin 7 March 2023 'This is why "polycrisis" is a useful way of looking at the world right now', *World Economic Forum*. https://www.weforum.org/agenda/2023/03/polycrisis-adam-tooze-historian-explains/

particular crises all splattered on the whiteboard with little red threads strung between them. Though this description might seem somewhat facetious, it is a literal description of how polycrisis is often depicted, as in the original 'Global risks landscape' graph map displayed at Davos, in which clusters of crisis nodes scaled by size according to their 'risk influence' are categorised by colour (orange for geopolitical, green for environmental, purple for technical, etc.) and linked to one another by edges that, though somewhat sensible, are ultimately spurious since nearly any node could conceivably be connected to any other. Nonetheless, polycrisis is, perhaps, the closest the economists can come to something like a recognition of capitalism's intractable contradictions, resembling Tycho Brahe's elaborate and highly accurate geocentric model of the solar system, which conceded everything to the heliocentrists aside from the sun itself.

Ultimately, though, what appear to be the many nodes in a polycrisis are in fact localised swells of that more general, underlying crisis long described by communist thinkers: an extended tendency toward systemic breakdown visible in recurrent economic downturns and emerging from intrinsic instabilities (in classical parlance, 'contradictions') in the valorisation process, which then rapidly scale up to threaten social reproduction as a whole. Though the roots of this breakdown tendency trace back to various constraints placed on the production, flow, and realisation of value – not because these characteristics are more fundamental in some ahistorical sense but simply because they are made to take on a material priority in capitalist society – it also exceeds the conventional image of 'economic' crisis visible in the bursting of asset bubbles or the oscillation of the business cycle. These economic contradictions are merely moments in which broader socioecological instabilities are expressed, which is precisely why they then generate, in the foreground, the 'political' crises that drive increases in civil strife and armed conflict and, in the background, long run 'environmental' crises that register the impact of these social-metabolic flows within both local ecosystems and global biogeochemical cycles.

All are, however, driven by the same fundamental laws of motion, much like ripples on the surface of a river express the same force as the plummet of the waterfall. Within the bounds of this metaphor, we could say that breakdown expresses the long-run motion of the river system down to ever-lower altitudes, while crisis manifests that long-run tendency at the local scale. Given a certain topography of class forces and a determinate volume of value – both ultimately products of class struggle playing out in the course of history – the local motion of the system may accelerate suddenly, generating new sources of potential energy, even while the force of gravity pulling the system ever-downward remains the same. When the flow of value changes cadence in this

fashion, the confluence of localised business cycles or bursting asset bubbles in one market can, if large enough and close enough to one another, quickly create a chaotic chain of interference that easily expands beyond the economic sphere. But the underlying breakdown tendency remains unchanged: even the purely 'economic' manifestations of crisis are, ultimately, outcomes of the particular social rituals through which our metabolism with the non-human world is organised, playing out in time and space.

Given that capitalist production is, at root, a system of social domination upheld by the threat of violence, the clustering of crises will always also invoke the spectre of war in all its horror. In a way, war is already inherent in the hostile fraternity of competition itself. We might even say that war is less an unfortunate breakdown of the market and more the market – as class dictatorship – at last unveiled in all its grim and grotesque glory. As Mattick argues, war 'is not so much a question of competition by "extra-economic" means as an unmasking of economic competition for a bloody and primitive struggle between men and men.'[9] When individual capitals are forced by class struggle to cooperatively consolidate their own interests within larger blocs, their allegiances and animosities tend to cleave along loosely sectoral and national lines. Similarly, when profit narrows beyond a certain point, the dictatorial structure of the capitalist firm takes on more expansive functions, deploying military force to discipline labour, ensure the flow of resources, and maintain the general integrity of its supply chains.

Trade is therefore not so much 'war by other means' as war *in utero*, seeded when competition begins to spill beyond the bounds of the market, and gestated by the ratcheting of violence in the steady back-and-forth of tariffs, sanctions, and nested proxy conflicts. Eventually, something breaks and the beast is again cast from the womb of the market to smear its bloody hide across the surface of the world. Worse still: the beast is semelparous, and its long, deadly passage is therefore also a sort of spawning. Through its very destruction, war creates new trade routes, new resource pools, new labour forces, and new production lines, rejuvenating the global economy by pockmarking it with new hills of ash. As Henryk Grossman, perhaps the most famous of the classical Marxian crisis theorists, notes: 'far from threatening capitalism, wars – despite the losses they inflict on individuals – *prolong* the existence of the capitalist system as a whole. The facts also prove that after every war capitalism experiences an *upturn*.'[10] In other words, war is the health of the market.

9 Mattick 1969, p. 135.
10 Grossman 2021, p. 87.

This is precisely why the waxing and waning of armed conflict also serves to indicate the state of the prevailing hegemonic order. When a single, well-ordered faction of capital has secured its hegemonic position against all challengers, large-scale warfare remains a thing of the past or a grim potential on the distant horizon. Instead of major military engagements, mild stutters of conflict within the minor circuits of value circle in the eddies of the great channels pushed and pulled by the major trade wars, which remain largely administrative affairs. The most extensive armed actions in these periods remain the long-term occupations and policing wars of the reigning imperial power and the slower-simmering of violence in the sacrificial 'conflict zones' of the far hinterland. Though these are often extended conflicts, they are also deeply asymmetrical. For every thousand soldiers killed, perhaps 5,000 civilians die in bombing campaigns and another 10,000 of famine and disease.[11]

Throughout, violence is largely the vocation of 'non-state actors' and the various armed forces tasked with policing the seedier corners of the global economy. This is the era of 'small wars,' quiet coups, and ongoing counter-insurgency, in which conflict, though deadly, is mostly experienced as a form of displacement. Though armed conflict easily spreads across the forsaken landscapes that spawned it, this spread is, in fact, the form through which mass violence is contained. If the hegemonic position of the reigning imperial power begins to decay or grow more distant, however, these one-sided forms of state violence and murky proxy conflicts will slowly give way to open intervention by the militaries of the sub-imperial blocs to whom power has been delegated and, from there, this violence will escalate into increasingly organised regional and civil wars. Eventually, the blood tide will spill out of the hinterland to lap at nearer shores. Mercenary forces will proliferate alongside the total mobilisation of the population in state-based conflicts of growing scale and severity. Invasion, annexation, and civil war become real prospects for territories that once lay well within the 'green zones' of the global order. In Bonnano's terms, we might say that this signals the point at which the contradictions of the social order have successfully seeped through walls of the 'Teutonic castle,' infecting the 'included' with the disease of mass violence that once afflicted only the forsaken ones beyond the castle walls.

Though none of the conflicts currently raging across the globe are yet 'major' wars, they are no longer small, either. And there are many: In Gaza, close to

11 Such eras are also punctuated, here and there, by sudden excesses: mass expulsions, a quick and dirty war, even a minor genocide – all followed by immediate horror, recriminations, the slow and dull processing of asylum applications and human rights inquiries. While these events remain common in periods of stability, they are not yet contagious.

30,000 were killed in the first six months, the vast majority civilians.[12] If indirect deaths are accounted for, by June of 2024, the figure was estimated to be as high as 186,000, accounting for some seven to nine percent of the total population.[13] In Myanmar, direct violence in the civil war likely killed 50,000 in its first three years.[14] Ukraine saw somewhere near half a million total casualties in the two years after the 2022 invasion, mostly soldiers (many newly drafted), with somewhere between 10 and 20,000 civilians dead and tens of thousands wounded.[15] In Ethiopia, the Tigray War and the famine induced in its aftermath likely killed as many as 600,000 between 2020 and 2022, with the highest estimates nearing a million.[16] And of course the 'small' wars continue as well: in Sudan, at least 14,000 dead within the first year.[17] In Yemen, likely 400,000 dead over the course of a decade, most from famine and disease.[18]

To put these numbers into perspective: the most likely estimates of total casualties over nearly two decades of war in Iraq range between 300,000 and 600,000, and, in Afghanistan, between 200,000 and 300,000.[19] Meanwhile, the

12 Alfonseca, Kiara 29 April 2024 'Palestinians mourn loss of culture with the rising death toll amid ongoing Israel-Hamas war', *ABC News*. https://abcnews.go.com/US/palestinians-mourn-loss-culture-rising-death-toll-amid/story?id=109705142

13 Khatib, Rasha, Martin McKee, and Salim Yusuf, 05 July 2024 'Counting the dead in Gaza: difficult but essential', *The Lancet*. https://www.thelancet.com/journals/lancet/article/PIIS0140-6736(24)01169-3/fulltext

14 According to data from the Armed Conflict Location and Event Data Project (ACLED) Dashboard, available here: https://acleddata.com/dashboard

15 By comparison, the 2014 invasion of Crimea and subsequent war in Donbas saw somewhere between fourteen and fifteen thousand dead. The Wikipedia page for 'Casualties of the Russo-Ukrainian War' provides the best overview of all the current estimates from different sources, broken down by various categories: https://en.wikipedia.org/wiki/Casualties_of_the_Russo-Ukrainian_War.

16 The higher estimate comes from Abdurahman Sayed, quoted. in van Niekerk, Phillip 22 February 2023 'Ethiopia's Tigrey war and the "big lie" behind the century-defining 600,000 civilian deaths', *Daily Maverick*. https://www.dailymaverick.co.za/article/2023-02-22-ethiopias-tigray-war-and-the-big-lie-behind-the-century-defining-600000-civilian-deaths/; the lower estimate has been repeated in several independent studies, the most widely quoted being that by a team from Ghent University, detailed here: Plaut, Martin 19 October 2022 'New estimate of the Tigrey death toll', *Martin Plaut*. https://martinplaut.com/2022/10/19/new-estimate-of-the-tigray-death-toll/

17 Eltahir, Nafisa 6 March 2024 'Millions of Sudanese go hungry as war disrupts food supply', *Reuters*. https://www.reuters.com/world/africa/millions-sudanese-go-hungry-war-disrupts-food-supply-2024-03-06/

18 As estimated by the UN Development Programme in: Hanna, Taylor, David K. Bohl, and Jonathan D. Moyer 2021 'Assessing the Impact of War in Yemen: Pathways for Recovery', *UNDP*. https://www.undp.org/publications/assessing-impact-war-yemen-pathways-recovery

19 The Iraqi figures are highly contested and I am citing the medium range here. A detailed

Rwandan genocide likely saw between 500,000 and 800,000 dead.[20] In other words, Ukraine and Ethiopia have seen more dead in two years than died in Iraq over the course of 20 years and both conflicts are now approaching the death toll seen in Rwanda. Meanwhile, Yemen now outranks Afghanistan in terms of total casualties despite only being at war for half as long.[21] Only the Second Congo War – often referred to as Africa's World War, and still technically the deadliest conflict since World War II – saw more total deaths than any of the wars of the early 2020s (though it has already been surpassed in deaths-per-year). In total, the conflict was estimated to have killed between two and five million between 1998 and 2008.[22] However, only some 300,000 or 400,000 were killed through direct violence, the rest dying of disease and starvation. This means that the Russian invasion of Ukraine had already seen more die of direct violence in its first two years than died in an entire decade of warfare in the DRC.

In retrospect, a shift seems to have occurred sometime in the early 2020s. Prior to this point, 'economic' crises such as the Great Recession, European Sovereign Debt Crisis, and minor stock market panics seemed only distantly linked to ongoing wars and the looming environmental catastrophe. The planet was pockmarked with periodic and parallel crises, but these had not quite yet cohered into a 'polycrisis' in the public consciousness. Perhaps the coronavirus pandemic – simultaneously ecological, economic, and governmental – was the threshold beyond which these myriad troubles began to wind together into a singular sense of doom. And yet the arrival of the wars on the tail of the plague seemed simply to confirm something that we'd all already come to know, translating vague intuition into empirical evidence.

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breakdown of all major sources is available on the 'Casualties of the Iraq War' Wikipedia page: https://en.wikipedia.org/wiki/Casualties_of_the_Iraq_War; The figure for Afghanistan is derived from the Watson Institute for International & Public Affairs at Brown University: https://watson.brown.edu/costsofwar/costs/human/civilians/afghan.

20 These figures have also been hotly contested, with the Rwandan government claiming 'more than a million' dead but providing little evidence for this claim. The debate is summarised in: Reydams, Luc June 2021, '"More than a million": the politics of accounting for the dead of the Rwandan genocide', *Review of African Political Economy*, 48(168). https://doi.org/10.1080/03056244.2020.1796320

21 Syria was perhaps the conflict bridging the two eras, insofar as it seemed initially to follow the pattern of insurgency and state failure seen in Iraq and Afghanistan only to grow far bloodier far more quickly – also seeing the semi-official involvement of intermediate powers such as Turkey and Russia. Altogether, between 2011 and 2021, the conflict likely saw four to six hundred thousand dead.

22 The figure of 5.3 million is the most commonly cited, but was halved in later apprais-

Source: UCDP/PRIO Armed Conflcit Dataset version 24.1

FIGURE 38 Number of armed conflicts

According to the best available data, total deaths from organised violence experienced a mild spike in the mid-2010s (led by the war in Syria), dropped off slightly toward the end of the decade, and then began to skyrocket in the early 2020s. Between 2021 and 2022 alone, 'total fatalities in organised violence increased by a staggering 97%' making 2022 'the most violent year recorded since the Rwandan genocide …'[23] Maybe more importantly, non-state conflict was replaced by increasingly organised wars within and between states, visible in the growing share of output funnelled through taxes into both direct and indirect forms of militarisation. Total global military expenditure had already been increasing in every consecutive year since 2014. But spending spiked in the early 2020s, with the steepest increase between 2022 and 2023, when the figure reached some 2.3 trillion USD, or 2.3 percent of global gross GDP and 6.9 percent of all government expenditure.[24]

This new wave of militarisation has neither been evenly distributed nor has it been solely concentrated in the traditional 'conflict zones' that arose in the

als: Associated Press 20 January 2010, 'Review of Congo war halves death toll', *NBC News*. https://www.nbcnews.com/id/wbna34958903

23 Davies et al. 2023.

24 Tian, Nan, Diego Lopes da silva, Xiao Liang and Lorenzo Scarazzato 2024 'Trends in World Military Expenditure, 2023', *SIPRI Fact Sheet*. https://www.sipri.org/sites/default/files/2024-04/2404_fs_milex_2023.pdf

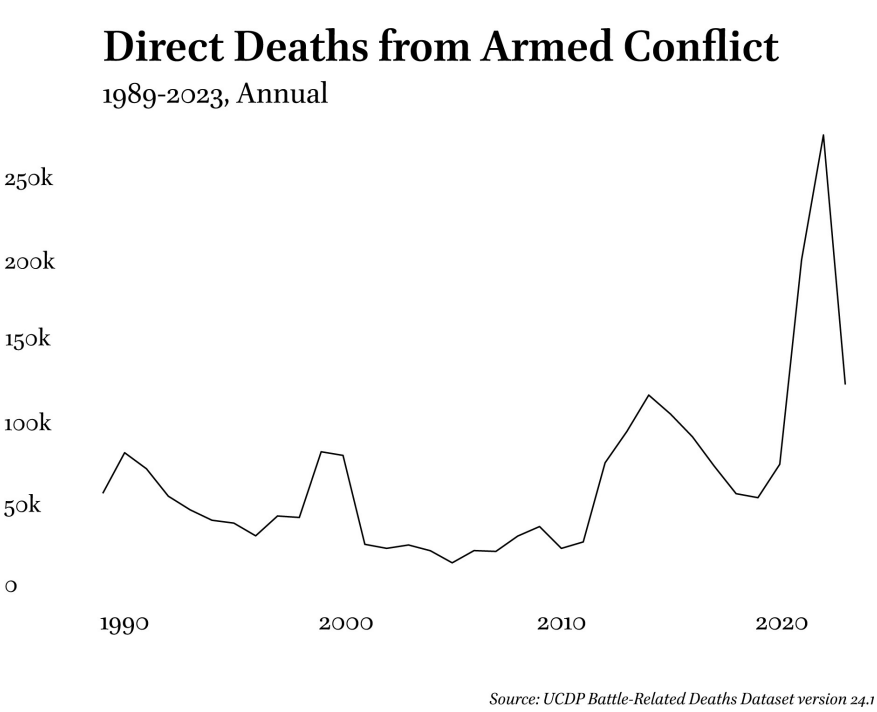

FIGURE 39 Total deaths from armed conflict

wake of the Cold War. For example, in contrast to the 2000s and 2010s, which saw disproportionate increases in military spending throughout the Americas and the Middle East, the 2020s saw military expenditure increase across the entire world, with the largest new growth in Asia and especially Europe. Between 2014 and 2023, Ukraine of course saw the most astounding increase (1,272 percent), and steady growth was visible in China (60 percent), Turkey (59 percent), Russia (57 percent), Germany (48 percent), Israel (44 percent), and India (40 percent) over the same years, alongside many others.[25] Despite popular narratives that equated rising militarisation with 'authoritarian' rule, there seems to be no correlation whatsoever between increasing militarisation and the level of 'democracy' enjoyed in a given country. For comparison, Thailand, ruled by a literal military junta that took power in 2014 and ceded power in 2023, only saw its military budget increase by 0.6 percent in those same years.

25 Perhaps most notably, Sweden (63 percent, ranking 28th in 2023), Algeria (59 percent, ranking 19th), the Netherlands (56 percent, ranking 20th), Taiwan (56 percent, ranking 21st), Mexico (55 percent, ranking 24th), Greece (51 percent, ranking 33rd), and Canada (49 percent, ranking 16th), as recorded in Ibid.

Similarly, the ostensibly 'democratic' United States remains by far the largest single source of military funding, composing some 37 percent of the total, with China a distant second at 12 percent. But other powers were increasing their military spending even more rapidly.

And, contrary to another common narrative, this growth in military spending has been fastest not among challengers to the hegemony of the US but instead among proxy powers aligned with the reigning imperium. In a grim echo of history, the fastest growth in military expenditure outside of Ukraine has been in Poland (181 percent) and other 'Eastern Flank' NATO powers such as Romania (95 percent) and Finland (92 percent), with rearguard support provided by Denmark (108 percent).[26] Meanwhile, although the US, Russia, and France still dominate global arms exports, Israel has also become a major exporter of small arms, UAVs, and crowd control equipment to governments in poorer countries.[27]

The Polish case is particularly representative of the general trend. The country's right-wing government had already begun to slowly build out its security capacity in response to the so-called migrant crisis in the latter 2010s – itself an early indicator of the deeper crisis brewing under the surface, linked to ecological collapse, economic depression, and earlier conflicts such as those in Syria.[28] By the 2020s, Poland then pursued a series of escalating arms deals with major military-industrial conglomerates.[29] Following the Russian invasion of Ukraine, the country openly announced its intent to become the largest and strongest military power in the EU, invoking its mythic history as the 'savior of Europe.'[30] It is now following the Ukrainian example in building out its tradi-

26 Ibid.

27 Tress, Luke 4 April 2022 'Israel ranked world's 10th-largest weapons exporter in past five years', *Times of Israel*. https://www.timesofisrael.com/israel-ranked-worlds-10th-largest-weapons-exporter-in-past-five-years/

28 See: Kabata and Jacobs 2023. Over subsequent years, the migrant crisis was also increasingly linked to the perceived Russian threat, with Polish media reporting that 'Authoritarian regimes in Moscow and Minsk are aiding Iraqis and Afghans in order to sow chaos and domestic discord in Eastern European countries' (Grzywaczewski, Tomasz 18 September 2021 'Russia and Belarus Are Using Migrants as a Weapon Against the EU', *Foreign Policy*).

29 Jones, Paul 28 September 2023 'Poland Becomes a Defense Colossus', *CEPA*. https://cepa.org/article/poland-becomes-a-defense-colossus/

30 The phrase refers to several famous historic roles played by Poland in regional history, namely the 1683 rescue of Vienna from the Ottomans by Jan III Sobieski's military at the behest of the Habsburgs and the Battle of Warsaw in 1920, when the Polish military defeated the Red Army and successfully prevented the Russian Revolution from spreading further into Europe.

tional land-based forces, aiming to recruit tens of thousands of new infantry and artillery troops while spending almost five billion euros on 30 M1 Abrams tanks from the US, and even more to purchase 'nearly 1,000 K2 Black Panther main battle tanks' from South Korea. This militarisation has also contributed to the country's industrial boom, with more than 800 of the K2 tanks set to 'be produced in Poland under the license obtained by South Korea' between 2023 and 2033.[31] The Russo-Ukrainian war was similarly followed by an expansion of NATO to include Finland in 2023 and Sweden in 2024, their military budgets rising to 6.6 billion and 11.83 billion USD, respectively. Much of this militarisation has remained underreported, especially as compared to the media blitz on tensions in the South China Sea. It is notable, however, that the spike in military spending in East Asia (52 percent between 2014 and 2023) has been far more subdued than that seen in Eastern Europe (118 percent) and only marginally higher than that seen in Central and Western Europe (43 percent).[32]

In every sense, then, the growing threat of war seems to confirm the general intuition that society lies on the edge of some sort of epochal collapse. And yet intuition is always suspect, since it is so often simply the gut sense of ideology. After all, empires tend to thrive on fantasies of their own collapse. Even worse, fantasies of collapse have often – in fact, nearly always – served to stimulate new frontier movements of the profane order itself, tracing a bloody line from the Puritan Settler colonies of the atrocity called 'New England' to the apocalyptic California hippie culture that helped to spawn Silicon Valley. Imagining some cascading, catastrophic, conspiratorial sequence of nearly supernatural catastrophes seems to be, at least in part, how the profane reality of power is perpetuated. Meanwhile, the *deus ex machina* of the coming apocalypse can serve as a psychological salve in much the same way that any similarly religious fantasy helps to soothe our suffering with the promise of some far-away justice to come. We imagine that the young god of capital has now run up against the feet of those other gods, older and more inscrutable – the silent ones who inhabit still waters, unfurling cotyledons, the dark space between stars – and the rash demiurge will, at last, be consumed in the chthonic force of the ancient mother-destroyer. An old, comforting story, recounted in the firelit darkness of a dying world.

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31 Carbonaro, Giulia 9 June 2023 'Poland said its army will soon be the strongest in Europe. But is that possible?' *euronews*. https://www.euronews.com/2023/09/06/poland-said-its-army-will-soon-be-the-strongest-in-europe-but-is-that-possible

32 The case of Taiwan demonstrates a similar disjunction, with foreign media in the early 2020s mistaking the regular tit-for-tat posturing between the Taiwanese and mainland governments as signs of an imminent invasion that never came to pass.

2 Eternal Granary

Along the highway leading out of Arusha, in Northern Tanzania, corn stalks and other grain crops shake in the wind of passing traffic. If they grow too tall or get too close to the road, the government orders them cut. Otherwise, the small strips are treated as narrow troughs of common land tended by locals from the foothills below Mount Meru. Every morning, I would follow a footpath that wove between these plots and the asphalt, walked by hundreds of local villagers heading back and forth between markets, farms, and hand-built homes in the mountains. Periodically, new construction turns the customary plots into parking lots for heavy machinery marked with the faded logo of Chinese construction conglomerates. The machines kick up red dust, their weight packing the earth as the workers weave out the line of iron and asphalt behind. On my route, there was one such section where a new highway into the city was being built. Despite reporting to the contrary, all the workers were Tanzanian, save one manager from Hebei, standing in a freshly cut trench digging at something I couldn't see, covered head to toe in crimson mud. And, beyond the work zone, the heat of the savannah warped the horizon into much the same mirage that I'd see years later off the Swahili Coast: a promised prosperity always almost about to dawn, glowing just below the edge of the long night.

Over the years, the distant tide of light waxes and wanes, but never rises. When the highway is lain and the machines have moved on, the land closes in again. Grass edges back toward the asphalt, worn to dirt where soft footfalls etch desire paths between the villages. Gradually, the heavy machines are replaced by herded livestock and brightly painted flocks of minibuses. Traffic along the road increases but brings little with it. Freight trucks rush to and from the Kenyan border, followed by tourist caravans and the shining cars of the NGO people. And yet the tide of prosperity rarely follows the road – or the bridge or the railway or the pipeline. Instead, the wave of capital crashes and foams just short of here before receding back across the sea. Employment spikes for a moment, then the crops creep back in along the sidelines. The Japanese had come to the same area in the 1980s, building a series of small bridges during their own real estate boom.[33] Then, as now, the expansion took on a hyperbolic character in the media, aggravated by growing trade tensions. And then,

33 The Japanese outbound FDI boom in the 1980s is well documented and the country still funds large infrastructure projects in Tanzania, such as two recent road expansions near the port and the TAZARA rail terminus (documented in Neel 2021). The bridge projects outside Arusha were identified as Japanese projects by older residents of nearby villages.

as now, no real prosperity followed. Sometimes people washed laundry in the stream below. In the heat of summer, the ditch grain still sparkles like gold, sheaves spilling from an eternal granary.

In contrast with the grim spectre of war rising from the black earth at the heart of Eurasia, the grain sprouting from the red dirt on the roadside seems almost idyllic. Sub-Saharan Africa has, in fact, been among the only regions of the world where military spending declined (by 22 percent) between 2014 and 2023.[34] Despite ongoing conflicts – some of which, as in Tigray and Sudan, are quite deadly – the long, brutal civil wars, bloody military juntas, and questionable 'peacekeeping' missions that followed the continental crisis of the 1980s seem to have reached a peak around the turn of the century. After this point, countries across the region experienced extended stretches of peace not seen since the early years of independence. The Second Congo War was perhaps the turning point, as the conflict drew in militaries from all over the continent seeking to secure a mineral-rich region increasingly essential to global value chains. But minerals are not the whole picture. Copper and cobalt can be mined elsewhere, as can rare earths. The real amenity of the Congo was an abundance of people without land and land without people, both products of the conflict.

In other words, accidents of geochemistry were ultimately less important than a particular social geography sculpted by a war that was itself simply an outcome of many decades of forcible underdevelopment. The war enabled extreme forms of value extraction that then translated into a *de facto* subsidy cheapening the cost of materials for downstream product lines assembled in the Asian core of the planetary factory. This then created an economic basis, however shaky, for the ascent of local blocs of comprador elites specialising in the supply of these cheapened materials on the global market, the prices of which were temporarily buoyed by the commodities boom.[35] This shift from open warfare to compradorial governance over the course of the 2000s thereby marked the end of the era of generalised conflict, even while it intensified environmental destruction. Meanwhile, violence was not eliminated but instead internalised within the associated value chains, where it became simply an administrative tool to be deployed like any other.

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34 Tian et al. 2014.

35 Similar trends were visible in neighbouring Angola and Congo-Brazzaville, where civil wars ultimately created the conditions for the rise of new elite regimes founded on increased exports of cheapened oil to China. All were essentially compradorial compacts marketed to the local population as a means of development, despite having a much narrower basis than developmental programs pursued elsewhere on the continent.

These were the years in which Sub-Saharan African countries began to see per capita incomes, mortality levels, and other wellbeing indicators finally exceed their pre-crisis levels (Figure 40). In many of these countries, the first decades of the new millennium also saw the first peacetime generation reach adulthood, migrating to the new megacities or seeking out new forms of marketised livelihood in a countryside where mere subsistence was either undesirable or no longer feasible. And this population boom is just the beginning. While the world's current population centre in East and Southeast Asia has already seen its population plateau, Sub-Saharan Africa is forecast to lead global population growth for at least the next century. Growth in the region is even projected to outpace that in Central and South Asia (currently set to make India the largest country sometime before 2050). Over the next few decades, countries such as Nigeria, Ethiopia, and the DRC are already expected to become some of the largest in the world.[36] Some estimates even suggest that Africa as a whole will be host to 4.2 billion people by 2100.[37]

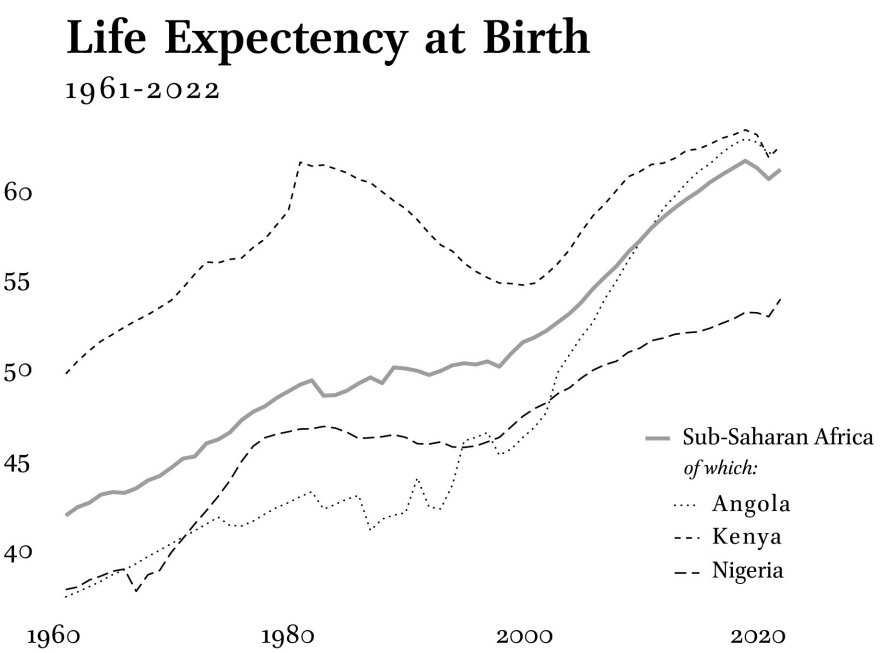
Given that commensurate declines are predicted in essentially all other regions, this would make it the single largest population centre on the planet.[38] By that same year, Nigeria alone is projected to be larger than China. And yet employment and industrialisation lag far behind:

> Here is a population in which tens of millions of labourers are cut off from farmland yet are also unable to find waged employment, which in Nigeria is prized for the comparatively high income it provides, though few such jobs even come with employment contracts, much less paid leave or other benefits. This is a society in which the pace of the demographic transition is dictated by the degree of proletarianization undergone by households. In a society in which almost all workers are self-employed, house-

36 UN 2022 'World Population Prospects 2022: Summary of Results', *United Nations Department of Economic and Social Affairs, Population Division*, New York: United Nations, pp. 5–6. https://www.un.org/development/desa/pd/sites/www.un.org.development.desa.pd/files/wpp2022_summary_of_results.pdf

37 Anoba, Ibrahim B. 24 September 2019 'How a Population of 4.2 Billion Could Impact Africa by 2100: The Possible Economic, Demographic, and Geopolitical Outcomes', *The SAIS Review of International Affairs*. https://saisreview.sais.jhu.edu/how-a-population-of-4-2-billion-could-impact-africa-by-2100-the-possible-economic-demographic-and-geopolitical-outcomes/

38 Ezeh, Alex, Frances Kissling, and Peter Singer 14 July 2020 'Why sub-Saharan Africa might exceed its projected population size by 2100', *The Lancet*. https://www.thelancet.com/article/S0140-6736(20)31522-1/fulltext



Source: World Bank (*SP.DYN.LE00.IN*)

FIGURE 40 Life expectancy at birth – Sub-Saharan Africa, Kenya, Nigeria, Angola

> hold income is provided by low-productivity goods production and service provision: street vending, personal services, household repairs, 'petty trading.'[39]

And yet these handicrafts and informal services are no longer mere matters of customary production and rural subsistence, either – representing 'non-capitalist social formations,' in the classical terms of dependency theory – but are instead massive and modern markets, sometimes plugged directly into global value chains and sometimes subsisting beneath them, all while transforming landscapes and livelihoods to better accord with the needs of accumulation.

Rather than industrial takeoff, then, proletarianisation has been accompanied by a vast wave of agrarian expansion similar in kind but much larger in scale than that which took place in postwar Thailand or the nineteenth century

39 Smith 2024.

United States. In some locations, the declining prospects of subsistence agriculture and the geographic expansion of cash crops and artisanal mining have largely been driven by demographic increase within an already-populous countryside. This is the case in much of East Africa, where population geography is best described as a pattern of distributed density. Though the average population density in Tanzania as a whole is still far lower than in much of Eurasia, it is nonetheless comparable to that seen throughout the Americas, despite a significantly higher share of rural population. The difference is in the topography of settlement. Though most dense in urban nodes such as Dar es Salaam and thinnest in the most sparsely populated regions, the demographic mesh remains surprisingly thick in most rural areas.

For example, Kilimanjaro Region, which is Tanzania's coffee production and eco-tourism hub, has a population density similar to that of Denmark.[40] Meanwhile, in Rwanda and Burundi, both of which have some of the highest shares of rural population in the world (82 percent and 86 percent, respectively in 2022), population density is higher than Japan, which has one of the lowest shares of rural population in the world (a mere 8 percent in 2022).[41] This is only possible because national density is a simple average that eliminates internal geographic variation. Local density in Tokyo would, of course, be higher than that in Rwanda and far higher than that in the relatively depopulated Japanese countryside. By contrast, although densities would of course be elevated around the capital Kigali, a random sampling of the Rwandan countryside would see relatively high population densities nearly everywhere. Compared to rural counties only a few hours outside the major cities of the US West Coast, the East African countryside feels basically metropolitan.[42]

In other parts of the continent, agriculture and rural industry have been expanded through new waves of mass migration into less inhabited areas, often marked by slash-and-burn agriculture. Similar to the transformation of upland

40 Around 140 people per sq. km., according to the 2022 Census, compared to 146 per sq. km. in 2021 in Denmark, according to the World Bank (indicator EN.POP.DNST).

41 According to World Bank indicator SP.RUR.TOTL.ZS. Rwanda's population density was 546 people per sq. km. in 2022, Burundi's was 489, and Japan's was 345 (indicator EN.POP.DNST).

42 To take one interesting example, I compared Siskiyou County, CA (the rural area where I was raised) to Katavi Region of Tanzania, one of the country's least populous regions. And yet Siskiyou County has a population density of 2.7 people per square kilometre, while Katavi Region has a population density roughly ten times higher, at 25 people per sq km. Even Katavi's least populous administrative division, Mlele District, likely one of the least inhabited portions of East Africa as a whole, has a density more than twice that of my home county, at 7.6 people per sq km.

areas in postwar Thailand, this wave of frontier settlement has been accompanied by rapid deforestation. Cash crops have been important causal factors in the process but, although the expansion of large-scale plantation-style agriculture has driven deforestation in certain parts of Western and Southern Africa, the rapid growth in small-scale family farms has been by far the largest single cause, 'resulting in 64% of total forest loss from the year 2001 to 2020.'[43] The bulk of this deforestation occurred in Central Africa, with the trend especially pronounced in the DRC, which contains the second largest rainforest and one of the largest remaining concentrations of primary forest on the planet, where refugees fled to escape escalating violence and often remained after the formal end of hostilities.[44] As of 2003, some 3.4 million people had been displaced by the wars and, over a decade later, the vast majority had still not returned to their original homes. The decommissioning of soldiers, the opening of new mining ventures, and a continual stream of internal migrants fleeing renewed conflicts in the Eastern provinces then continued the trend over subsequent decades. Altogether, between 2001 and 2023, the country lost at least 19.7 million hectares (Mha) of tree cover, or 9.9 percent of its total tree cover (equivalent to 12.3 Gt of carbon).[45] An estimated 85 percent of this forest loss was due to the expansion in small-scale cropland.[46] Increasing wildfire incidence contributed several hundred thousand hectares more.[47]

Notably, much of this settlement is concentrated in the mineral-rich southeastern provinces, where larger zones of deforestation associated with the expansion of small-scale agriculture tend to encircle smaller cores of deforestation caused by mining activity and by human habitation in newly erected villages near mining sites.[48] Despite their small direct footprint, artisanal mines therefore tend to anchor and amplify the wave of agrarian settlement driving the trend. One study found 'elevated deforestation spreading at least 5 km from mines and an additional 4.5 percentage points of initial area lost 10 years into mining within the same distance,' with each mine accompanied by 'forest loss from farming and settlement expansion 25 times larger than the area directly

43 Masolele et al. 2024.

44 Zielinski, Sarah 26 February 2014 'Congo's civil Wars Took A Toll On its Forests', *Smithsonian Magazine*. https://www.smithsonianmag.com/science-nature/congo-civil-wars-forests-180949888/

45 GFW 2024 'Democratic Republic of the Congo', *Global Forest Watch*, [accessed: 6 May 2024]. https://www.globalforestwatch.org/dashboards/country/COD/

46 Masolele et al. 2024.

47 GFW 2024.

48 This can be seen in the interactive map linked in Masolele et al. 2024.

lost to mining …'[49] By comparison, conversion to large-scale cropland and cash crop plantations accounted for 16 percent of total forest loss across the continent, though the number was higher in West African and Sahelian countries.[50] The most important of these cash crops are cacao, cashews, oil palms, rubber, and coffee. But many of the food crops grown on small-scale plots are likewise produced at least in part for sale on the market, often in the new towns that have sprung up around mining ventures.

The process has also produced a strange sort of frontier culture that echoes the interweaving of mining booms and agrarian settlement seen elsewhere. On the ground, the effect is somewhat uncanny. I recall wandering through winding paths in the misty hills above that road outside Arusha, in an area wedged between one of Tanzania's major mining zones and its largest coffee-producing regions. Expecting the population to thin as I climbed to higher altitudes, the opposite seemed to be the case, as slender mountain trails gave way to pathways filled with laughing children and bustling villages where hand-built houses hunched on alpine meadows. Fields of potato and cassava stretched below cloud-skirted peaks as goats bleated in the distance. Rivers ran softly through the valleys. Small motorbikes and hobbled-together carts deftly wove around corners on rain-rutted roads of red mud. Men sat in monobloc chairs in front of streetside bars chatting with relatives or negotiating arcane transactions on rugged feature phones. The plastic chairs, hot and gently softened in the tropical heat, reminded me of those same chairs on that plaza in Shenzhen, where the company that produced the feature phones was likely headquartered. More than anything, though, the scene recalled the rivers and mountains that raised me, the potato crop tended in the red earth beyond our hand-built home, the musty, slightly sour smell of goat, the rutted dirt road etched eventually into instinct, and of course here and there and in every countryside the men sitting on plastic chairs in the dust talking business and bullshit.

But perhaps the strangest echo of home was auditory. The speakers hung from the branches of a tree beside the bar were playing American country music, the sharp twang of Buck Owens, Hank Thompson, and Emmylou Harris shaking the pale leaves. There, outside Arusha, the Bakersfield Sound drifted out into a landscape much like the one that birthed it. Nor was this a mere coincidence or random curiosity. Not only were bars such as this – we might as well call them honky-tonks – scattered around every corner in the countryside, but

49 Ladewig et al. 2024.

50 Roughly 9 percent is accounted for by more diversified large-scale cropland, while 7 percent was driven by plantation crops (Masolele et al. 2024).

classic country music had also become popular across an astoundingly large portion of rural Sub-Saharan Africa. The genre is obviously most common in the anglophone areas that had once been British colonies, although there are important outliers such as the Ivory Coast. In rural Kenya, just across the border to the north of that small village in the mountains, Kenny Rogers and Dolly Parton are effectively patron saints.

It makes sense when you think about it. Country is, fundamentally, something like the soundtrack of social metabolism: it is about reproduction, the cycling of the seasons, all the blood and grit that attend dependence on the wage. As communist thinker and music journalist Joshua Clover explains, the genre 'is structured by two cycles; one we might call the cycle of life, the other the cycle of money.'[51] The product of a simultaneously economic and ecological crisis in the 1930s, the genre has always been a music of love, luck, and land, as transformed in the threshing violence of work and migration. These themes are then gendered, naturalised, or at the very least rendered in the timeless tone of tradition. Ultimately, though, the 'wheeling gears are not natural, not universal' but are instead 'a diagram of the class relation, capital and proletariat – the two words that country music … [is] not allowed to say.'[52] On the more mundane level, there should also be little mystery about why nations with huge populations of farmers, ranchers, miners, and migrants would be attracted to a genre that narrates the vicissitudes of rural life. Similarly, the social conservative invocation of tradition and even the salient Christian themes of the genre seem tailormade for a region where appeal to tradition carries political currency and evangelical preachers can be heard screaming '*Jina la Yesu!*' on every household radio.

I pulled up my own chair in the dust, ordered a beer and rested for a while. Monkeys schemed in the branches above the speakers, tugging at the wires. Someone threw a rock, and they scattered, replaced by the voice of Merle Haggard: 'It's the coldest time of winter / and I shiver when I see the falling snow.' At first, the song seemed as incongruous with the equatorial summer as the more general transposition of the genre from Nashville to Nairobi. Ultimately, though, the popularity of country music here, in perhaps the last portion of the planet that might be characterised as truly *country*, is perfectly natural. The uncanny effect has less to do with the music itself and more to do with the peculiar racial imaginary that codes it. And this racial imaginary is itself

51 Clover, Joshua 18 June 2014 'Generations and Repetitions', *The Nation*. https://www.thenation.com/article/archive/generations-and-repetitions/

52 Ibid.

the product of long histories of political struggle that ended in defeat and were thereby wiped from the mainstream cultural consciousness.

In other words, country is coded as white solely because its syncretic, inherently multiracial, and distinctly proletarian origins have been continually whitewashed out of it. As Clover argues, the genre mobilises mythic gender roles and dogwhistle prejudice to displace any overt recognition of the class conflicts illustrated in its own lyrics. Merle is perhaps among the most infamous examples, his intimate appraisals of poverty filtered through themes of race and nation in a confused but nonetheless complex consciousness of how class chisels out the contours of our lives, separating us from the products of our labour and, thereby, the others through whom we ourselves exist. The unity of the collective worker can only be experienced through its dismemberment. In that moment, I myself was the aberration, divided from those around me. In such situations, people ask where I am from, why I am there. And yet there in Tanzania, as in China, as in Thailand, as in the vast deserts of the American West, I sit in the same plastic chairs in the same proletarian plazas and chat with people about the same basic struggles: too much work for too little money, the ever-worsening weather, how there is no way to get ahead here but no way to go back to anywhere else. I show the scar from an old injury suffered running fence lines and others offer their scars in exchange, each story not so much bartered as bared. Are my wounds really so different from theirs? Is the sweat drawn under distant mountains not salted much the same as that drawn here under hills that carry different names?

3 Every Town a Bakersfield

If music has a soul, then maybe it returns, like the dead, to its home. The first popular country recordings in the 1920s and 1930s by artists such as the Carter Family were closely modelled on those of black blues musicians and gospel singers.[53] In fact, many songs were not so much written as gathered, with Alvin Pleasant Carter notorious for collecting and copyrighting traditional

53 Even the genre's mythic points of reference – cowboys, farmers, bootleggers – were far less homogenous than they were retroactively made out to be in the racial mythos constructed in the middle of the twentieth century. To take maybe the most well-known example: at the height of the industry, at least one in four cowboys were black, with the term itself originating as a derogatory reference to specifically black cattle workers (white workers in the industry were initially referred to as 'cowhands'). (Marrow, Getty and Lynch, Nikkita A. 13 August 2012 'Black on the Range: African American Cowboys in the 19th Century', *Rancho Los Cerritos Historic Site*.)

folk music from the Appalachian countryside. Among those from whom he gathered songs from was Lesley Riddle, a black guitarist who had lost a leg in an industrial accident. Riddle then joined Carter on his song-hunting trips, with Carter writing down the lyrics to the songs and Riddle memorising the melodies. Riddle, of course, never became a formal member of the Carter family and was never named in the subsequent copyrights.[54] Similar stories abound: Jimmie Rodgers was a student of blues and vaudeville. Hank Williams studied under famous black guitarist Rufus 'Tee Tot' Payne as a child.[55] Meanwhile, black artists were even more prominent in the 'hillbilly music' genre that would form the basis of modern folk and bluegrass, and which ranked as one of the most racially diverse musical styles in the US until it was intentionally segregated by record labels during the Great Depression, when many black performers were scrubbed from the credits and their faces edited out of marketing images.[56] In fact, the thread can be traced further, as the hidden history of country music runs all the way back to Africa itself.

Country singers such as Jimmie Rodgers gained immediate popularity across Sub-Saharan Africa as early as the 1930s. And this popularity was surprisingly widespread. In 1950, British ethnomusicologist Hugh Tracey arrived in the western highlands of the Rift Valley to record the traditional folk songs of the Kipsigis people. Since the songs he recorded had no titles, he wrote down names such as 'Chemirocha I,' 'Chemirocha II,' and 'Chemirocha III,' after a word he'd heard repeated several times in the lyrics.[57] Eventually, however, he found out that this was simply the villagers singing the name 'Jimmie Rodgers,' whose albums had been introduced by missionaries during World War II and whose mystical yodelling had since come to signify 'all things strange and new and from out of town – and not necessarily in entirely positive terms.'[58] One of these songs was essentially an anti-colonial anthem, asking 'why white men

54 Harwood, Robert W. 30 April 2021 'The Carter Family, Ralph Peer, copyright … and, oh, Lesley Riddle', *I Went Down to St. James Infirmary*, Blog. https://iwentdowntostjamesinfirmary.blogspot.com/2017/02/a.html

55 Holley, Santi Elijah 6 March 2024 'How Black artists helped make country music what it is today', *National Geographic*. https://www.nationalgeographic.com/history/article/black-history-in-country-music

56 Chow, Andrew R. 11 September 2019 'Black Artists Helped Build Country Music – And Then It Left Them Behind', *Time*. https://time.com/5673476/ken-burns-country-music-black-artists/

57 Petrusich, Amanda 16 February 2017 'The Magnificent Cross-Cultural Recordings of Kenya's Kipsigis Tribe', *The New Yorker*. https://www.newyorker.com/culture/cultural-comment/the-magnificent-cross-cultural-recordings-of-kenyas-kipsigis-tribe

58 Mazor 2009, p. 103.

have taken over the country.' Another was a fertility song, in which the mysterious Jimmie Rodgers was portrayed as a 'Pan-like local god of the libido, with antelope's feet.'[59] Nor were the Kipsigis the only imitators:

> There is the case of Sammy Ngako, a yodeling cowboy of the Kikuyu people from elsewhere in Kenya, a little later in the '50s. He made professional records of Rodgers-style singing, yodeling, and guitar runs – in his own tongue – and performed wearing a cowboy hat. In the '60s, there was the singing star S.E. (Soolimon) Rogie, billed as 'the Jimmie Rodgers of Sierra Leone.'[60]

Other local styles emerged among African musicians in places like Zambia and Zimbabwe (at the time, both part of Rhodesia), who mirrored the Western sound and often incorporated overlapping indigenous themes, such as *huro*, a form of yodelling used in traditional Shona music.[61]

Then, as a new generation of rock-influenced 'outlaw country' musicians emerged in the 1970s in the US, they were matched by a wave of funk- and disco-inflected country in places like Nigeria, carrying a similar outlaw spirit. Emma Ogosi even liked to wear a cowboy hat when performing his anti-colonial disco-country hit 'Slave Drivers (Get Out).'[62] While imports have always dominated the African market, then, local artists have nonetheless persisted. Today, Kenya is likely the leader, with singers like Sir Elvis, Ythera Cowgirl, and Steve Rogers widely known for their original work, their reproductions of local hymns and gospel songs, and their English and Kikuyu-language covers of greatest hits by Dolly Parton, Kenny Rogers, and George Strait. Walk into any village in the rural Rift Valley and you are guaranteed to find at least one person (and likely more) who can sing the lyrics to 'The Gambler' by heart. As the overlapping of indigenous styles suggests, however, it is more accurate to understand this cultural import as a sort of homecoming rather than an exotic novelty. After all, the key instruments associated with country music, such as the guitar and the banjo, were themselves foreign imports to the US bearing their own African history – the former developed as the *oud* transmitted across North Africa to Medieval Islamic Spain (the word guitar comes from the Arabic *qīthārah*), and the latter

59 Ibid.

60 Ibid.

61 Many of these songs were recently reissued in the 2019 collection *Bulawayo Blue Yodel*, by US-based Olvido Records.

62 A collection of Nigerian country music from this era, *Like Nashville in Naija*, was released by US-based label Comb & Razor Sound in 2012.

a West African instrument brought to the Americas via the slave trade.[63] In a way, then, Merle's ghost seemed right at home.

The song continued: 'If we make it through December / Got plans to be in a warmer town come summertime.' And it was winter in the Southern hemisphere, even if it wasn't, technically, December. Nor were the lyrics really about the weather: 'Got laid off down at the factory / Heaven knows I been working hard.' Despite his later portrayal as representative of a mythically traditional working class, invariably white and conservative – as in the classic image of the Okie from Muscogee – Merle was in fact always something more like the troubadour of the out-of-work worker, the proletarian defined by dispossession rather than integration into any industry. Again, crisis played a central role: his parents moved from Oklahoma during the height of the Depression, following the flow of Okies to California, where they bought a boxcar and converted it into a small house in Oildale, just north of Bakersfield. Located at the heart of the San Joaquin Valley, Bakersfield had begun as a boomtown during the California gold rush of the 1850s, with oil discovered in the area soon after. Agricultural capacity expanded alongside the early gold mines and oil wells, first to feed the new waves of settlers and soon after for export. These industrial amenities would then draw in the railroads during the Gilded Age, linking the city to other booming urban centres throughout the West and triggering a series of battles between competing speculators.

The railroad also brought a large Chinese population, who founded not one but two Chinatowns in the area.[64] Meanwhile, the 1856 Tule River War had seen ranchers and miners instigate conflicts with the Yokuts nation, which then escalated until the genocidal California State Militia and a special detachment of the US Army were sent in to finish the war and dispossess the Yokuts *en masse*.[65] Survivors were sent to the nearby Tule River Farm (later the Tule River Reservation) alongside members of the Mono, Tübatulabal, and Paiute nations, where they were forced to become agriculturalists selling goods in the region's

63 Allen, Greg 23 August 2011 'The Banjo's Roots, Reconsidered', *NPR*. https://www.npr.org/2011/08/23/139880625/the-banjos-roots-reconsidered

64 Historical Research Centre 2024 'The Two Chinatowns of Bakersfield', *CSU Bakersfield*. https://hrc.csub.edu/housing-history/chinatown/

65 A surprisingly balanced contemporary account of the conflict can be found in: Steward, George W. 1884 'The Indian War on Tule River', *Overland Monthly*, 3, 1: 46–53. Reproduced here: https://escholarship.org/uc/item/7bc636q0; Detailed evidence of the genocide is documented here: State of California 2024 'Timeline of Genocide Incidents in the San Joaquin Valley Region', *State of California Native American Heritage Commission*. https://nahc.ca.gov/cp/timelines/san-joaquin/

newly-marketised agrarian economy.[66] Bakersfield was thereby transformed into a cosmopolitan boomtown filled with migrant settlers working as oilmen, farmhands, itinerant cowboys, and mercenaries, all existing in uneasy proximity to new pools of migrant workers from as far afield as the Qing Dynasty, as well as the original inhabitants of the area, only recently dispossessed. Saloons and brothels – the precursors of the later roadhouses and honky-tonks – then arose to provide food and entertainment for this new and volatile proletariat.

The Haggards were simply one household in the newest crust of settlement layered on the strata of blood and sweat seething under the California dust. Merle's father worked for one of the railroads and, after an untimely death, the family was supported by his mother's bookkeeping job. Rather than following his father into the now-booming industrial sectors fattened by the war, however, Merle instead gravitated toward crime, committing a string of petty thefts and assaults. In response, he was sent to a series of juvenile detention centres, from which he frequently escaped. Hitchhiking and riding freight trains around California and, briefly, Texas, he worked a series of gig jobs common in the era: driving trucks, pitching hay, shooting oil wells, working the grill at a local diner, playing music in local bars at night. But poverty plagued him and, in 1957 he tried to rob a Bakersfield roadhouse, for which he was sent to jail and, after again attempting to escape, shipped off to San Quentin. Even in prison, he couldn't quite keep a job, instead starting his own gambling and bootlegging racket after being fired from various production lines. Eventually, however, his exposure to death row inmates and the execution of a friend with whom he was plotting an escape led him back to industrial work in the prison factory, committed to reform. Then, as the now-famous story has it, Merle witnessed one or both of Johnny Cash's famous San Quentin performances in 1959 and 1960, which convinced him to pursue a music career fulltime upon his release.[67] A little more than a decade later, he would be officially pardoned by California governor Ronald Reagan.

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66 Kenneth McDarment 2015–16 'Testimony of Kenneth McDarment on behalf of the Tule River Tribe of California In Support of H.R. 4685, the Tule River Indian Reservation Land Trust, Health, and Economic Development Act', *US House of Representatives*, H.R. 4685 Testimony. https://democrats-naturalresources.house.gov/imo/media/doc/testimony_mcdarment1.pdf

67 For the basic contours of the biography, see: Cusic 2002, pp. xvii–xxvi; For the story of Cash and Haggard in San Quentin, see: Yahr, Emily 8 April 2016 'Merle Haggard's too-good-to-be-true story about Johnny Cash? It really happened', *The Washington Post*. https://www.washingtonpost.com/news/arts-and-entertainment/wp/2016/04/08/merle-haggards-too-good-to-be-true-story-about-johnny-cash-it-really-happened/

4 A Place to Fall Apart

Across the street, a child coated in dust from the waist down sold snacks out of a small, hand-crafted wagon and then passed on, wheels turning. The song cycled through its circuits. Work cycles into unemployment. Boom cycles into bust. Mines are cut like furrows, forests burn, and supply chains fissure. Growth slows and frontiers open. New roads are lain. As always, the lonesome whistle blows. If the wars building on the edge of Europe are essentially regional struggles over market territory born from the crisis-narrowed calculus of decaying hegemony, then the wars haunting the immediate future of Africa might best be understood as wars of opportunity. Once-local conflicts between minor elites at the furthest frayed edges of the supply chain now draw in planetary interests, posing the prospect that new sub-imperial orders might emerge from the chaos.

Perhaps the clearest example is Sudan, where a popular uprising that began in 2018 successfully fractured well-worn political alliances founded on the oil industry, driving long-time president al-Bashir from power with the blessing and backing of the military. Under al-Bashir, the Sudanese economy had atrophied and bifurcated into a small, formal sector centred on state employment in and around the oil industry – which then shrank with the secession of South Sudan in 2011 – and a massive and growing informal sector that employs most of the population to this day. Several years earlier, in 2012 and 2013, protests against the increasing cost of living had broken out, grown into a general uprising against the regime, and then been quickly crushed. Over time, the state also grew more and more brazen in its repression. As described by Sudanese activist and engineer Muzan Alneel: 'By its very nature, the limited resources available within the rentier economy require a system of oppression to ensure its survival. It was only logical that economic demands would trigger oppression, more military spending, and the creation of militias across the country's rural areas.'[68] Nonetheless, it was also the experience of this earlier uprising that laid the groundwork for the revolution later in the decade.[69]

By 2018, cost-of-living issues had only been aggravated by further rounds of retrenchment: 'The value of the Sudanese pound to the US dollar dropped

68 Alneel 2022.

69 In fact, we can trace the roots of the revolution much deeper, through Sudan's long history of resistance, ranging from the original Anti-Colonial Front to the Anti-May Regime Front that had successfully ousted an earlier military regime in 1985. Nonetheless, the new generation of resistance committees and workers organisations also evolved somewhat 'spontaneously,' formed more out of practical need and informal affinity than under any particular organisational influence inherited from the past.

from 18 pounds at the beginning of the year to 80 by the fourth quarter, triggering a snowball effect in a country that manufactures little and imports most of its necessities. Long queues were the norm in bakeries, gas stations, and even banks due to a scarcity of cash that appeared to be the result of inflation.'[70] In response, new protests began to break out across the country. As early as January, the Sudanese Communist Party had organised an enormous march against Bashir and 'called on the people of Sudan to build a popular movement in opposition to the proposed economic austerity measures and the sharp increase in food prices and high cost of living.'[71] Similarly, associations of workers throughout the broader reproductive sphere (teachers, doctors, pharmacists, journalists, even veterinarians) began to spearhead their own early protests, demanding a living wage and better working conditions.

But these pre-existing groups of reproductive workers, loosely unified in the Sudanese Professionals Association (SPA), did not have an extensive network of local representatives capable of mobilising truly large-scale protests. Similarly, although organisations like the Communist Party had retained some influence in the shrunken industrial sector – where they competed with the pro-regime unions – they had not built out a similar infrastructure across the hidden abode of reproduction, despite the fact that most of the Sudanese proletariat subsisted on informal employment in services or small handicraft industries. What would come to be known as the December Revolution or simply the Sudanese Revolution – itself the largest uprising in a 'Second Arab Spring' that extended from Algeria to Iraq – was therefore only made possible when the relatively small initial protests were bolstered by the revival and expansion of the neighbourhood-level resistance committees (RCS) that had arisen earlier in the decade. These were then accompanied by the emergence of new unions affiliated with the RCS in places such as the Bahri industrial zone, where work 'falls within the informal sector' and 'the workers often double as the employer, running small-scale businesses that are largely overlooked by the government,' suffering from low incomes, high taxes, and little to no access to social services.[72]

Initially rudimentary affinity groups that 'typically consisted of three to five members who were part of the same social circle' and who all supported the 2013 anti-government protests, some of the RCS had then confederated into a loose coalition known as the Sudanese Resistance Committee in the years that

70 Alneel 2022.
71 Elnaiem 2024.
72 Ajak et al. 2024.

followed.[73] By 2017, this coalition expanded its formal infrastructure to systematically build out new branches at the town and neighbourhood level in areas that had no representation. This formalised wing of the RCs thereby became 'an organised body with an elected leadership council and branches in many towns across the country.'[74] Nonetheless, throughout the revolution that began late in 2018, this formal apparatus would remain dependent on and often found itself in tension with the larger, decentralised and collaborative network from which it had emerged. Relatively small and informal groups would continue to serve as the foundation for organising. At this point, few of these groups even referred to themselves as 'resistance committees,' though many would come to adopt the terminology after the fact. Both these informal neighbourhood groups and the semi-formal Sudanese Resistance Committee would come to operate as a check on the SPA and, later, the opposition alliance within the transitional government – which would simultaneously treat the RCs as a threat and a potential resource to be coopted.

Many accounts imply that the SPA, faced with escalating repression throughout 2018, somehow summoned the RCs (back) into existence. But this is not quite right. In late 2018, the prospect of reviving decentralised neighbourhood protest networks had already begun to be discussed by prominent figures associated with the opposition. Then, in early December, in the relatively poor and agricultural Sennar State, it was not the SPA but in fact the Communist Party who first released a statement 'calling for the reactivation of the neighbourhood resistance committees and for a popular response to high food prices and to overthrow the Islamist regime.'[75] This call was then followed by a series of small revolts, first among high schoolers and residents in poorer cities in the southeastern periphery and then in Atbara, a major logistics city in the northeast.[76] It was in Atbara that the SPA stepped into its coordinating role. Protests then spread from the periphery back into the Hamdi Triangle, the country's metropolitan core. In December, 'there were over 30 active resistance groups in Khartoum, but as the protests began, dormant groups began to rise and contacted the larger, established committee.'[77]

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73 Abbas, Reem 7 May 2019 'In Sudan, neighbourhoods mobilised against al-Bashir', *Al Jazeera*. https://www.aljazeera.com/news/2019/5/7/in-sudan-neighbourhoods-mobilised-against-al-bashir

74 Ibid.

75 Elnaiem 2024.

76 Ibid.

77 Abbas 2019.

New committees also emerged at the neighbourhood level, again beginning largely as small affinity groups or functional organisations tasked with providing food or equipment to protestors:

> While the activist Sudanese Professionals Association and its allies organised a national strategy and negotiated the deal for a partial handover of power, which many are still suspicious of, it was the resistance committees who ensured daily, localised protests and neighbourhood activities that stretched the abilities of security forces to crack down on protesters.[78]

With the intervention of the RCs, the *de facto* leadership of the uprising thereby spread from the relatively higher-wage professional associations and established opposition parties into a variegated grassroots network in which a semi-formal, mass democratic infrastructure floated atop a proliferation of functional affinity groups staffed largely by young proletarians in the low-wage or no-wage reproductive sector spanning urban and rural Sudan.

However, after al-Bashir's administration was replaced by a transitional alliance 'between the military council of the old regime and … a coalition of the traditional opposition parties, mostly representative of … agricultural and commercial capital, as well as urban reformist parties' – this civilian coalition was now referred to as the Forces of the Declaration of Freedom and Change, or FFC – the RCs began to find themselves worn down by pragmatic compromise:

> For years, the RCs tread [*sic*] a fine line of supporting the coalition government – official propaganda portrayed the two sides as being in harmony and vilified all criticism of the transitional government as sabotage by the ousted regime – while pushing to advance the agenda of the revolution, particularly with regard to criminal and economic justice. Yet the regime's glowing propaganda was contradicted by reality, as every action, decision, and position taken by the new regime prioritised preserving the partnership and shielding the old economic and political elites over advancing the goals of the revolution, proving that the two goals were irreconcilable.[79]

78 Amin, Mohammed 9 July 2019 'Sudan's resistance committees plot "new wave" of protests against power deal', *Middle East Eye*. https://www.middleeasteye.net/news/sudans-resistance-committees-plot-new-wave-protests-against-power-deal

79 Alneel 2024.

This transitional government was also bogged down by global sanctions originally applied to the al-Bashir regime. To rejoin the 'international community,' the Sudanese people would be required to normalise relations with Israel and pay reparations to the US for the actions of the government they had just overthrown. By failing to do so, the new transitional coalition was deprived of traditional sources of international aid and credit. As a result, the country was cast into a deepening economic crisis that was met with new rounds of austerity. The military would then use the growing unpopularity of the civilian half of coalition to oust the opposition parties entirely. Thus reduced to a coup, the revolution faltered.

Though the coup itself would not be fully completed until 2021, the first moves in this direction began as early as the summer of 2019. After the rise of the transitional military council, the RCs had organized ongoing protests centred on a sit-in at government headquarters in Khartoum demanding that the military immediately and unconditionally step down. At the end of May, the SPA also launched a 'political strike … completely paralysing the country, including its airports, sea ports, institutions, and markets.'[80] Initially, these mobilisations seemed to have succeeded in hindering the work of the military council. But the FFC 'was slow to heed the calls for a strike, with some even publicly opposing the call,' instigating widespread fear that 'the elitist parties would give in once more to their addiction to compromise and fear of radical change' – a prediction soon borne out when the FFC entered into negotiations with representatives from the EU, US, and UAE, all while proving unable to stop the coming massacre.[81]

Meanwhile, in the background, the RCs appeared to be forming a rudimentary participatory infrastructure that might soon serve as a basis for dual power beyond the auspices of the formal state. At their height, they 'organised a deliberation process encompassing some 8,000 neighbourhood resistance committees around the country that resulted in a series of political charters and road maps.'[82] These activities ran parallel to formal administrative machinery: 'Each state has a coordinating body for all the resistance committees within it, and these coordinating bodies communicate across states … Issues particular to one state are also discussed in other states, so that all can benefit collectively from these experiences and use collective thinking to make decisions after extensive discussion at the grassroots level.'[83] Similarly, the workplace councils

80 Alneel 2021.
81 Ibid.
82 Alneel 2024.
83 Ajak et al. 2024.

that had formed in places like the Bahri industrial zone also collaborated 'with numerous unions and organizations in other industrial zones across Khartoum and other states. They … held meetings and workshops to establish a coordination body for all industrial zones, involving representatives from seven zones within Khartoum state.'[84]

However, despite this process of politicisation and the existence of a semi-formal national confederation, there was ultimately 'no unification of the neighbourhood resistance committees,' many of which remained devoted to pragmatic work, and, as local institutions, tended to reflect their immediate conditions. For this reason, 'a neighbourhood resistance committee in a poor neighbourhood in Khartoum might have a lot more in common with a resistance committee somewhere in the periphery than another neighbourhood in Khartoum.'[85] These same factors then contributed to rising internal tension between the RCs that made further political coherence difficult: 'We saw some neighbourhood resistance committees in Khartoum starting to build a structure and go through what they saw as a democratic process, to give them legitimacy or some sort of legal status … The closer a resistance committee was to the centre of power and wealth, the more "reformist" their political stances tended to be'[86] Throughout, the RCs also remained entirely unarmed and exclusively non-violent, specialising in civil agitation and service provision, with no means to defend themselves against assault by the national military or the various militias that operated throughout the country.

In early June of 2019, the military council therefore responded to the political strike with deadly force. The government cut off access to the internet and ordered soldiers – most from the Rapid Support Forces (RSF), some from the national army – to encircle the protestors who were staging the occupation in Khartoum and open fire with live ammunition. Similar raids were launched on protest camps in other parts of the country on the same day: 'The security services simultaneously attacked the sit-ins across 14 Sudanese cities. Survivors' testimonies document brutal scenes of rape, torture, and murder. In some cases the bodies of the dead as well as the living were tied up, weighted down with stones, and thrown into the Nile.'[87] Though the media blackout made estimating the total number of dead difficult, later investigations have concluded that, at minimum, more than a hundred were killed, including at least twelve children. Hundreds more were injured. Nonetheless,

84 Ibid.
85 Elnaeim 2024.
86 Ibid.
87 Alneel 2021.

> the military continued to receive generous international backing. The Emirati and Saudi governments announced grants and loans to support the Military Council. Likewise, the African Union sent its own mediators to call for dialogue between the opposition leadership and the Military Council, which had led the massacre. Inter-state coordination of investments and interests emerged through the so-called 'Friends of Sudan' meetings, which began in Washington in May 2019. The attendees comprised the United States, Germany, the EU, Qatar, Saudi Arabia, the UAE, and Ethiopia.[88]

And yet the Khartoum Massacre did not eliminate the protests. In fact, in response, over '7 million Sudanese women and men took to the streets in displacement camps, cities, and villages on 30 June 2019, demanding civil rule.'[89] Many RCs were nonetheless forced underground or switched from organising protests to specialising in aid and service provision.

By the early 2020s, revolutionary momentum had thereby given way to the familiar back-and-forth of intra-elite conflict. Following the massacre, the military-dominated transitional council – now guided by a nominal power-sharing agreement between the generals and the FFC – then proposed a 2020 budget that 'included more aggressive economic liberalization and de-subsidization, high dependency on international grants, and failed to put forward a national economic and industrial policy.'[90] Still reeling from the massacre, many of the RCs and major opposition groups nonetheless still seemed to believe that placing pressure on the transitional government for policy changes and a return to civilian rule was still a viable strategy and therefore expended much of their energy 'engaging in deliberations and drafting economic alternatives' to the proposed budget.[91] As might be expected, none of these alternatives were pursued. Instead, the 'transitional government stood with investors against workers in the majority if not all incidences: industry and investment laws were changed to further accommodate large scale businesses, union law deliberations were dragged out and FFC union elections were never carried out.'[92] These new liberalisation measures then lead 'to inflation of over 300 percent by the third quarter of 2021. In 2018, 2 pounds for a loaf of bread ignited a revolution – now, that same loaf cost 20 pounds.'[93]

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88 Ibid.
89 Ibid.
90 Alneel 2022.
91 Ibid.
92 Alneel 2023.
93 Alneel 2021.

By October of 2021, any pretence of cooperation between civilian institutions and the military was then dropped when 'General Abdelfattah Alburhan, who also led the military, the transitional sovereign council, and the revived military council, cited "political and ethnic fragmentation"' as a justification to seize power. In response, the SPA and FFC called for protests, and farmers in the north suffering under recent trade restrictions 'sealed off the main road to Egypt with barricades. Their demands began with cancelling the tariff increase and grew to include health services, redistribution of mining revenue, and ending military rule.'[94] Similar protests emerged among students in Khartoum. Throughout 2021 and 2022, the RCS helped to coordinate the new surge of unrest, which was then met by escalating repression. As violence intensified, the state only fissured further, and international aid groups suspended their operations in the country.

In response, the RCS became the sole source of service provision in many regions. At their height, the

> committees and other grassroots initiatives undertook great efforts to operate hospitals, start community kitchens, and arrange evacuations while the coup government abdicated its responsibilities. However, instead of using these activities as a way to build new sustainable structures rooted in community self-management of resources, they continue to be carried out as short-term philanthropic efforts that fail to lay the foundation for popular power or expose the shortcomings of the system.[95]

Without any real basis for independent power or armed self-defence, however, ongoing grassroots mobilisation could do little to prevent the fissuring of the military alliance that had temporarily allied against al-Bashir. As a result, the RCS would soon find themselves specialising in the evacuation of civilians from a spreading warzone.[96]

In the Spring of 2023, the military council finally fractured, resulting in a bloody 'clash between the two most powerful military forces in the country – General Abdel Fattah al-Burhan, president since October 2021,' who was also the commander of the Sudanese Armed Forces (SAF), 'and General Mohamed Hamdan Dagalo, better known as Hemeti … Sudan's vice-president and com-

94 Alneel 2022.

95 Alneel 2024.

96 Nashed, Mat 22 April 2023 'Sudan "resistance" activists mobilise as crisis escalates', *Al Jazeera*. https://www.aljazeera.com/news/2023/4/22/sudan-resistance-activists-mobilise-as-crisis-escalates

mander of the powerful paramilitary Rapid Support Forces.'[97] Faced with escalating violence, the RCs had initially 'attempted to strike an impossible balance between calling for an end to the war and supporting the army of the coup government.'[98] But this impossible position had only been made possible by enough participants acting out of naïve faith in the elite-let political sphere. Throughout the protests, the FFC and SPA operated almost entirely within the mythos of civil society, presuming the existence of a rules-based international order and believing that the protests were essentially a matter of advocacy and awareness-raising designed to ouster a corrupt regime and peacefully transition to a sort of grassroots, civilian-led democracy – broadly captured by the concept of a 'Civil State,' or *dawla madanīya*, which has been a recurring theme in North African protests since the Egyptian Revolution of 2011.[99]

Although the pragmatism of the RCs had ensured that they retained an amorphous grassroots aspect, enough of them nonetheless bought into many of the same myths and therefore committed the same strategic errors. At a more fundamental level, though, the very functional focus that had first allowed RCs to serve as something like the scaffolding of the revolution and had then allowed them to take on the role of grassroots service providers also tended to disconnect them from politics proper: 'we were lost in that space of thinking we're just going to organise day-to-day life without necessarily changing the political decision-making structures.'[100] This is what then allowed political representatives (whether from the SPA, the FFC, or even the Sudanese Communist Party) to step in from above, carrying a particular vision of non-violent civic change that sorely underestimated the power, motivation, and genocidal capacity of the Sudanese elite. Put simply, the 'impossible balance' struck by the RCs was therefore 'the result of a lack of clear analysis of the state as a tool of the ruling class.'[101]

By the time that the RCs began to more systematically oppose the state, it was simply too late. In retrospect, the Khartoum Massacre foreboded a far more violent counterrevolution yet to come. Soon, the ensuing civil war between military factions would see the city wracked with street battles and continuous airstrikes. By 2023, it had been hollowed of its population, with the airport

97 Tooze, Adam 18 April 2023 'Chartbook #209 The Sudan crisis and the Sahel gold rush', *Chartbook*. https://adamtooze.substack.com/p/chartbook-209-the-sudan-crisis-and

98 Alneel 2024.

99 For a more detailed examination of the concept as expressed in the first Arab Spring, see: Lavie 2018.

100 Elnaeim 2024.

101 Alneel 2024.

destroyed and entire neighbourhoods reduced to rubble. Though less attention has been paid to the Sudanese civil war than the invasion of Ukraine or the genocidal bombardment of Gaza, the conflict between SAF and RSF had nonetheless killed some 15,000 people and displaced 8.2 million more within its first year, creating the worst refugee crisis since the war in Syria.[102] The once-exuberant tribunes of popular power that had overthrown the regime were thereby reduced to desperate refugee and aid agencies with little outside support, filling in the gap left after the NGOs all fled.

Meanwhile, the counterrevolutionary conflagration also illuminated the changing balance of power in the background. In the upper rungs of the global order, the entire process was quite clearly linked to onerous imperial demands made by the US, which held aid and international support hostage in exchange for reparations and recognition of Israel. But the struggle between SAF and RSF has also been a case study in the complexities of sub-imperial conflict, with each faction enjoying different degrees of patronage from a variety of lesser powers: 'Numerous global and regional countries have backed the SAF, including Saudi Arabia, Egypt, Iran and Russia, among others. On the other hand, regional powers, in particular the United Arab Emirates (UAE), have sustained the war through their support of the RSF.'[103] The RSF had also received border control funds from the EU. These foreign links served to generate further confusion and justify further concessions on the part of the resistance, which 'cites external support for the RSF (specifically, from the United Arab Emirates) as evidence of their treasonous nature, as if the hunger and death inflicted on Sudan's people is different when inflicted by those from within its borders.'[104] By eliciting a broader base of international support, then, the SAF 'has positioned itself as the "lesser evil" nationally and internationally to gain favor and legitimacy' despite the fact that 'both military factions have committed war crimes …'[105]

5 All the Gold in California

Sudan therefore finds itself in a complex constellation of elite conflict stretching from the war in Yemen in a belt across the Sahel, where the first four years of the 2020s saw coups depose every single government in a continuous chain

102 Centre for Preventative Action 19 April 2024 'Civil War in Sudan', *Global Conflict Tracker*. https://www.cfr.org/global-conflict-tracker/conflict/power-struggle-sudan

103 Akram-Boshar 2025.

104 Alneel 2024.

105 Akram-Boshar 2025.

from the Red Sea to the Atlantic.[106] Combined with ongoing conflicts in the DRC and across the Horn of Africa, this belt of socioecological catastrophe forms a scar of instability at the centre of the globe, inhabited by hundreds of millions of people. Though internally diverse, this territory is nonetheless unified by cross-border flows of resources and people – many of whom have been displaced by recent wars in Sudan and Ethiopia. Of resources, gold carries the greatest economic weight in the region, though rare earths, cobalt, uranium, and, increasingly, timber are also important.[107] The conflicts that lie at the heart of this belt have also been immediately international, taking the shape of a multilateral war in which the formal militaries of the affected countries have operated against and alongside local militias, Russian mercenaries, Islamic fundamentalists like Boko Haram, French Legionnaires tasked with securing Europe's supply of uranium, and any number of domestic and multinational firms with interests in the region.[108]

Regardless of the exact character of each individual intervention, however, almost all the major military ventures and rentier governments in the Sahel had ultimately become dependent on income from rapid increases in artisanal mining beginning in the 2010s. It is, in other words, a gold rush. Since those fleeing these conflicts find few ways to make a living, rural mining camps also came to function in part 'as migration hubs for a larger number of people who see their stay in the mines as a temporary stop on the way to Europe, the Gulf States, or North America.' Thus, the mines simultaneously serve as refugee camps, production sites, and market towns: 'Shops selling telephone accessories and credit are found all over the camps. The market operates as a meeting place where the local population gets the goods and groceries they need, and the gold miners get additional information on travel routes and agents that can help them get out of the country.'[109] Rather than simply a 'conflict zone,' then, these desert hinterlands are better understood as a vast, exploded production site knit together through the competitive-cooperative struggle of militias, firms, farmers, pastoralists, national governments, and international financi-

106 Walsh, Declan 19 July 2023 'Coast to Coast, a Corridor of Coups Brings Turmoil to Africa', *The New York Times*. https://www.nytimes.com/2023/07/29/world/africa/africa-coups-niger.html

107 Tooze, Adam 6 May 2024 'Chartbook 281 137 million people: From DRC to Yemen – a megaregion in polycrisis', *Chartbook*. https://adamtooze.substack.com/p/chartbook-281-137-million-people; For the role of timber, see: Blanshe, Musinguzi 03 April 2024 "How Congo's trees are smuggled through East Africa", *The Africa Report*. https://www.theafricareport.com/342361/how-congos-trees-are-smuggled-through-east-africa/

108 For the Franco-Russian aspect of this dynamic, see: Nadzharov and Entina 2023.

109 Abdul-Jalil 2023.

ers fighting over geographically rooted mineral veins and biddable sources of cheapened labour uprooted from the surrounding land.

Conventional appraisals of the Sahel explain these conflicts by appealing to the narrative that archaic orders reemerge whenever 'modern' political power breaks down: warlordism as a reversion to the brute force that precedes the market, artisanal mining as the revival of pre-modern production practices, fundamentalist Islam as a medieval spectre returned to haunt the present. But, while it is true that various forms of political and economic collapse have been central to these conflicts – foremost among them the fragmentation of Libya under US airstrikes – the results have not been some sort of historical reversion but instead a ruthless modernisation that has rewired regional supply chains and forced larger and larger shares of the population into direct dependence on the global market. Similarly, although this modernisation has certainly involved interventions by the old colonial and Cold War powers – in particular the increasingly militarised contest between Russia and the EU, here represented by France – the Sahelian conflicts do not represent a resurrection of the great power struggles of high imperialism, nor do they signal an 'upcoming age of multipolarity and new Scramble for Africa.'[110] Instead, what seems to be emerging is a splintered geopolitics in which the 'great powers' play important, but ultimately distant roles relative to ascendant sub-imperial interests. While some of the gold being pumped out of the Sahel may ultimately end up in a Cayman Islands bank account or in a smartphone produced in Zhengzhou, the actual dirty work of extraction, refining, and laundering is ensured by local and regional elites able to rapidly reposition themselves relative to changing flows of key materials and lucrative new forms of political arbitrage emerging from the ongoing fragmentation and recomposition of global value chains.

The Sahel might, in fact, be the first window into the 'Empire of Chaos' foreseen by Amin: US air strikes destroy the region's loadbearing powers without even the pretence of any reconstruction, inducing massive displacement and drawing in an array of 'non-state actors' specialising in mercenary force. Aspiring sub-imperial powers like the Saudis and Emiratis then use the opening to recruit mercenaries for proxy conflicts in places like Yemen, who return home with the connections and training to extend those conflicts across North Africa. Meanwhile, local militias and foreign-funded military ventures such as the Wagner group enter the field as essentially private firms, hired to protect local industrial sites and incentivised to extort money from whoever is weakest. In so doing, their actions imply murky geopolitical links to distant powers.

110 Nadzharov and Entina 2023, p. 1

Thus, the strategic positioning of military leaders like al-Burhan and Hemeti are hardly corrupt clashes between warlords seeking power for its own sake. They are instead the form taken by accumulation after it has been stripped by the desert winds to its barest necessities. Much as Khartoum's historic power has derived from its location on the fertile upstream plain where the Blue and White Nile unite into the grand river coursing toward Cairo, the present power struggle has been produced by a confluence of planetary value chains. After all, al-Bashir's fall tracked the loss of the southern oil fields following the secession of South Sudan in 2011: 'Whereas Sudan in 2010 benefited from oil exports of $9.69 billion, by 2015 its oil earnings were reduced to a paltry $627 million. This terrible blow triggered Khartoum into adopting a brutal austerity regime.'[111] The austerity package, paired with increases in cost-of-living, ultimately brought down the government.

Both military leaders now hope to reorient elite power around gold. Though small amounts of the metal have long been mined in the region, extraction has intensified 'since 2012 due to the discovery of a particularly rich vein that crosses the Sahara from east to west.'[112] The first of these finds were made in Jebel Amer, in Sudan's Darfur region, which 'soon became the theatre for a full-scale gold rush.' Between 2011 and 2014, 'Sudan's gold production surged to 70 million tons. Gold sales rose from ten percent of Sudan's exports to 70 percent. In 2015, 1 million workers and four million dependents were supported by the mining industry …' And, although the central government was ostensibly the sole legal buyer of artisanal gold, it 'struggled to match international prices,' printing currency to do so and thereby triggering severe inflation. The ultimate result was that 'perhaps as much as 90 percent of all gold produced in Sudan is exported through dark channels particularly to Dubai, which has become the major entrepot for gold exports from the Sahel artisanal mining boom.' In total, some 13.4 billion USD of gold were likely smuggled out of Sudan in 2022 alone.[113]

Nor is the dynamic limited to Sudan. Instead, 'the UAE is the major destination of gold from Africa' as a whole, specialising in gold sourced from conflict zones:

> Since little or no checks are done to verify the origin of gold, UAE becomes the destination of choice for conflict and smuggled gold … The dirty gold

111 Tooze 2023.

112 ICG 2019 'Getting a Grip on Central Sahel's Gold Rush', Africa Report No. 282, *International Crisis Group*, 13 November 2019. https://icg-prod.s3.amazonaws.com/282%20Getting%20a%20Grip%20.pdf

113 Tooze 2023.

> is then laundered through refineries to become UAE's gold. The refined gold bars are thereafter exported to other world's [*sic*] gold hubs as UAE's gold.[114]

Material flows move both ways, however. Since artisanal production is not an archaic relic from the past so much as a modern innovation in value extraction, it also combines crisis- and conflict-cheapened itinerant labour with electronics and other equipment pumped out of manufacturing centres in Asia, including hand tools, metal detectors, cellphones, and portable generators. As early as 2009, 'the Sahelian demand for metal-detectors was so intense that it produced a global shortage of the equipment …' Meanwhile, the mining process itself also required a steady input of chemicals: 'Mercury was used to extract the gold and sodium cyanide to process the tailings, resulting in huge health risks for the workforce and extensive environmental damage.'[115] This also required the extension of supply chains for such goods into the region, giving coastal powers such as Morocco, Nigeria, and Egypt the ability to play crucial subsidiary roles as transshipment corridors.

The discovery of the vast new vein only intensified these demands, drawing in migrants and smugglers from all over the continent, each of whom brought with them new flows of materials, both legal and illicit. One raid on criminal hotspots throughout the Sahel in 2020 saw police confiscate '50 firearms, 6,162 rounds of ammunition, 1,473 kilos of drugs (cannabis and khat), 2,263 boxes of contraband drugs, 60,000 litres of contraband fuel … and 40,593 sticks of dynamite!'[116] The new industry also increased the importance of military power. As explained by communist scholar of Sudan, Magdi el Gizouli, the gold mines became a crucial source of income for the RSF which now serves as Hemeti's troops in the civil war: 'since as early as 2016, the RSF served as a privatised army to provide security along transit routes, to transport equipment, and to smuggle gold out of the country.' The militia then discovered that one line of income can create another: 'if you have a well-functioning smuggling network around gold, the same network could function for other items, including narcotics.'[117]

The location of the newly discovered gold vein was also serendipitous for the RSF, given that the organisation was based in Darfur. In fact, the RSF traces its roots to the notorious Janjaweed militias that helped to spearhead the

114 Ndoricimpa 2024.
115 Tooze 2023.
116 Ibid.
117 El Gizouli 2023.

Darfur genocide of the mid-2000s. Evoking the image of similar mercenary groups implicated in similar genocides throughout history, the name 'Janjaweed' means something like 'devils on horseback,' or simply 'armed men on horses.'[118] Initially little more than ethnic chauvinist pastoralists concerned with protecting their cattle and asserting their grazing rights, the Janjaweed were then enlisted to serve as the Sudanese state's semi-official counterinsurgency force in Darfur in 2003 – similar to the case of the California State Militia a century and a half prior – before being brought under the formal command of the government in 2013.[119]

In fact, Hemeti himself entered Sudanese politics through his leadership of a Rizeigat tribal militia that would come to be a major force in the region, propelling him into leadership of the Janjaweed and, subsequently, the RSF. It is in this capacity that he has been accused of committing crimes against humanity, mostly for the 2004 Adwa massacre in South Darfur and the RSF's bloody 2014–15 operation throughout the region, both of which involved the systematic razing of villages, the massacre of civilians, and widespread allegations of torture and rape.[120] But, again, the rise of these militias should not be seen as some reversion to primitive forms of extra-economic coercion. The RSF and other local militias are instead an entirely modern technology of market power. This fact is especially visible in the financialisation of the militia enterprise itself:

> The RSF works in the countryside through its investment in debts – a market in debts, people-selling by index … the collapse of oil and the devaluation of the Sudanese currency by the interim government led to a big inflation wave after 2019, facilitating this market of debts for a vast

118 For comparison, the California State Militiamen engaged in the Tule River War were known simply as the 'Tulare Mounted Riflemen.' A history of the militia can be found here: WPA 1940 'California Militia and National Guard Unit Histories: Tulare Mounted Riflemen', *Works Progress Administration*. https://www.militarymuseum.org/TulareMountedRiflemen.html

119 Al Jazeera 16 April 2023 'Who is "Hemedti", general behind Sudan's feared RSF force?', *Al Jazeera*. https://www.aljazeera.com/news/2023/4/16/who-is-hemedti-the-puppeteer-behind-sudans-feared-rsf-fighters

120 For Adwa, see: Warrag, Alhaj 28 July 2010 'The Darfur Genocide: Ideology of Hatred in a Brokered State', *African Arguments*. https://africanarguments.org/2010/07/ideology-of-hatred-in-a-brokered-state/; For the 2014–2015 campaign, see: HRW 9 September 2015 '"Men with No Mercy": Rapid Support Forces Attacks against Civilians in Darfur, Sudan', *Human Rights Watch*. https://www.hrw.org/report/2015/09/09/men-no-mercy/rapid-support-forces-attacks-against-civilians-darfur-sudan

> tract of impoverished people. The RSF was a lending agency that could trap people into debts, even lending people to serve traders' prison sentences, and that's how it managed to enter rural trading networks beyond northern Darfur.[121]

This then 'brought with it some measure of stability, especially in regions of southern and eastern Darfur that were ravaged by wars between pastoral peoples over land,' which enabled the militia to absorb lesser competitors and operate as a *de facto* state: 'Indeed, in Sudan's vast peripheries the RSF, thanks to its military organization, logistical capabilities, and command over surplus, has assumed social provision and insurance functions.'[122]

Conventional narratives of 'tribal' conflict therefore completely fail to capture the fundamentally economic contours of power in the country. Militias like the RSF are, first and foremost, engines of employment, absorbing

> unskilled labour power on a permanent and a seasonal basis and provid[ing] an outlet for the export of labour in the form of fighters to the kings and princes of the Arab peninsula. Combat deployment in Yemen for teenagers from the villages of Kordofan and Darfur or informal labour reserves of Khartoum is one avenue for these youngsters to save cash, bring their mothers to the shanties around Khartoum and maybe build a home or buy a small bus.[123]

In fact, many who joined these militias did not even realise that they were doing so: 'UAE-based companies were recruiting fighters in Khartoum through employment agencies. People thought they were being recruited to work in supermarkets in the UAE, and they ended up in training camps in Libya.'[124] Though this was met with public outrage and helped to trigger the revolution in 2018, the practice also created the basic patronage structure that would go on to fund the RSF in its mature form, since it 'created an opportunity where there were independent relations between the RSF leadership and their employers in the United Arab Emirates and Saudi Arabia, independent of the formal channels of the Sudanese Armed Forces.'[125] These independent relations then

121 El Gizouli 2023.
122 Thomas and El Gizouli 2021.
123 Ibid.
124 El Gizouli 2023.
125 Ibid.

allowed the RSF to act as de facto subcontractors for Emirati gold interests, completely circumventing the official institutions of the SAF and the remnants of the Sudanese state.

These international links also meant that Sudan was increasingly exposed to the global market in violence. In fact, the Sudanese civil war was even arguably triggered by the cooling of the conflict in Yemen. As thousands of RSF mercenaries returned home from the war across the Red Sea,

> they needed income, employment, and some level of insurance. These were all young people who still had years of fighting careers ahead of them. The RSF had to manage its cash economy in terms of its investments, and it needed to find a purpose for these fighters. Any other corporation would start shedding off workers, but it's very hard to shed off soldiers. There were two ways ahead for the RSF. Either it would dismantle itself in some way, which wouldn't align with the interests of its leader Mohamed Hamdan or his Gulf patrons, or it would expand. But there was nowhere to expand except by capturing the state.[126]

Although foreign patronage was important, the decision to pursue the latter strategy was fundamentally a choice made to retain the integrity of the firm's balance sheet. And yet growth was only possible because of a more generalised marketisation that had already forced the largely agrarian population into increasing dependence on money for survival. In particular, the militarisation of the countryside was enabled by 'the expanding commodification of pastoralism and the need to safeguard the treks of herds to export markets in Libya and Egypt. The leader of the RSF [Hemeti] … began his career as a livestock trader who worked the hazardous desert routes between northern Sudan and southern Libya.' Similarly, the RSF runs a special security service 'set up to oversee the harvest season, a time when armed bands roam the land to capture freshly harvested crops still waiting in the fields to be adequately stored and transported.'[127]

At a higher level, we can understand the militias as local instantiations of a larger political marketplace that has attuned itself to the volatility of value at its desert headwaters. In such extreme conditions, the institutional finery draped over the monstrous shape of social domination wears thin. The divide between state and market blurs, a mirage cast up to dance above the dunes. By

126 Ibid.

127 Thomas and El Gizouli 2021.

confusing this institutional garb with the reality of power, the opposition forces ultimately ensured their own defeat. As regional scholar Alex de Waal explains it:

> In earlier eras, those ambitious political leaders who founded the forerunners of modern states acted in ways *akin* to the heads of criminal cartels. Today, their counterparts in poorly institutionalised countries are accurately described as *political entrepreneurs* and *political-business managers*, who *are* the chief executives and sometimes the owners of businesses, including criminal ones. They manage a modern, dynamic system, which is neither a historic relic nor a precursor to an institutionalised state.[128]

And these businesspeople operate in much the same fashion as corporate leaders anywhere else, seeking to 'increase revenue and limit costs.' To this end, they might 'finance their operations through debt, equity, revenue from operations, or rent,' with the latter the most stable, especially when anchored to a particularly safe asset like gold.[129] Many even 'use the instruments perfected by transnational corporations for profit shifting and tax avoidance,' after which they apportion a certain share of the overhead on public goods, often leveraging their *de facto* corporate assets to gain financing for infrastructural projects on global capital markets.[130]

Meanwhile, the demand for Sudanese gold is even more obviously linked to market dynamics, with the boom driven by both increased consumption for electronics manufacturing and rising demand as a safe asset in the face of an expansive and indefinite crisis that seems to have already arrived. In other words, we find much the same phenomenon as that which plagued the Chinese electronics firms: overcapacity inducing increasingly cutthroat competition in upstream sectors of the supply chain, which then induces various geographic expansions, organisational inventions, and technological transformations intended to intensify surplus extraction by any means necessary. And the scale of the industry is massive. As of 2019, the global sum total of artisanal gold production 'now reportedly amounts to almost half the volume of industrially produced gold.'[131] As of 2020, an estimated 2 to 3 million people were estimated to be directly employed in the gold sector within the Central Sahel (Burkina Faso, Niger, and Mali) alone, 'with more than 6 million being

128 de Waal 2015, p. 20.
129 de Waal 2015, p. 21.
130 de Waal 2015, pp. 24–5.
131 ICG 2019, p. 1.

at least partially dependent on the sector.'[132] In Sudan, another 2 million are estimated to be directly employed in artisanal mining, implying that millions more are indirectly reliant on it.[133] Meanwhile, the actual mining sites themselves are often enormous, with the largest employing tens of thousands of workers.[134] Comparisons to 'the mining camps of 19th-century California' are common, since the new towns springing up around these sites 'are wildly cosmopolitan places, peopled by migrants from across Africa, mixing communities – Muslim and non-Muslim – and opening up novel routes of trade and communication.'[135] Every town becomes a Bakersfield, in the end.

6 Are the Good Times Really Over?

Place a creature in the sun and sand of the wasteland and eventually the bone beneath blooms from the body, all flesh chained to stone. The same is true of social systems: cast the market into the desert of crisis and eventually its human skin will fray and fall away, revealing a skeleton on a pale horse holding a gun like a clarion. In Sudan, the spectre arrived in the figure of the Janjaweed. But, even more than Darfur, it is in Gaza that the logic of our social system is compressed into a concise calligraphy of violence:

> It's not a war, but rather the management of a surplus proletariat by the military means of total war, by a democratic, civilised state belonging to the central bloc of capitalist accumulation. The thousands dead there seem to me to have a particular meaning as they sketch a terrifying image of the future – of capitalist crises to come.[136]

In a way, then, it is only in the excess of the ensuing violence that the basic power behind the crisis itself becomes visible.

But this then poses the risk of equating excess with necessity, as if the specific configuration of historical forces in a particular moment is merely a mechanical expression of the underlying social logic that caused it. In fact,

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132 Raineri 2020, p. 104.

133 Blanco, Patricia R. 10 May 2023 'The curse of Sudan's gold: Why one of the world's poorest countries fails to profit from vast reserves', *El País*. https://english.elpais.com/international/2023-05-10/the-curse-of-sudans-gold-why-one-of-the-worlds-poorest-countries-fails-to-profit-from-vast-reserves.html

134 Raineri 2020, p. 104.

135 Tooze 2023.

136 Minassian 2023.

the opposite is true: the contradictory social forces immanent to capitalist production generate an inherent turbulence in the system that, pushed beyond a certain threshold, soon generates a chaos irreducible to its cause. Yes, Gaza is an extreme expression of the proletarian condition at its most abject, of the inherent violence of nation-making, of the ethnic parcelisation of the population by the threshing teeth of state and market. And yet, made ends unto themselves, these very expressions take on a zeal that pushes beyond the bounds of any systemic logic, toward the worship of pure annihilation. Perhaps the truth of it is best revealed by the Christian evangelists who support the Israeli onslaught purely out of the hope that it will bring about the end of the world, at last. And this is itself merely the sharpened form of that more general intuition of approaching doom felt throughout society. Embroider the same basic themes with environmental adornments – the chart showing our ever-upward divergence from the mean temperature of the Holocene, the maps of melting ice caps, the endless cycle of flood tornado drought – and you find essentially the same salvific ritual, coloured green. If there is a single myth that a theory of crisis strives to disenchant, then, it is not so much the economists' paper-thin mirage of equilibrium as the broad and resonant fear of and hope in the coming collapse.

Here, however, our colloquial terminology proves inadequate. When we speak of crisis, three distinct meanings crowd into a single breath. The first is precisely this: *collapse*, understood as the general sense of a wide-ranging civilisational or epochal cataclysm, expressed in an always-almost-fascist obsession with fantasies of some sudden societal catastrophe serendipitously producing an apocalyptic scenario that is portrayed in alternately utopian and dystopian terms. But the theory of collapse is not, in fact, a theory of crisis or even a theory at all. It is an aesthetic, an intuition, an ideological excrescence of individual crises experienced at the everyday level. For this reason, it often relies on causes exogenous to the social system as such: ultimate ecological, demographic, or geographic limits that simply cannot be surpassed. Individual crises are simply the initial tightening of these constraints, serving as dress rehearsals for the final catastrophe. The second meaning of the word is therefore *crisis* in the lower-case, understood here in the limited sense of periodic, conjunctural rearrangements in the balance of social forces, classically expressed as 'economic crisis' in the form of the boom-bust cycle, but also visible in more contingent instances of political fragmentation and environmental disaster. Thought on their own, however, these crises evince nothing more than the naturalisation of the social system – the business cycle replacing the harvest cycle – or else a series of eclectic accidents (the 'polycrisis') that could have been avoided by more adept management.

By contrast, the third meaning of the word is best described as *breakdown* (or perhaps 'Crisis' in the upper-case), understood as a long-run tendency for the immanent forces that maintain social reproduction to also gradually undercut its integrity. As Clarke explains, Marx's own work focused neither on a theory of crisis in the lower case (i.e., crisis as periodic economic bust) nor on 'the crisis as catastrophic event,' but instead centred on 'the inherent tendency to crisis that underlies the permanent instability of social existence under capitalism.'[137] Grossman referred to this 'inherent tendency to crisis' as an ongoing and dynamic 'breakdown' of capitalist social relations.[138] Whereas theories of collapse tend to attribute social disintegration to essentially exogenous forces, if not outright magical ones, breakdown finds the source of the system's entropy in the endogenous dynamics that push it forward in the first place. In simpler terms, this is a matter-of-fact recognition that social systems, like biological ones, cannot only be killed but are also born tending toward their own death – even if they are also able to self-renew in ways that organisms cannot. Nonetheless, every cell, biological or social, is governed by its own apoptosis. Though this doesn't rule out the influence of the external causes that play such an important role in theories of collapse, these factors neither replace nor disprove the gradual, intrinsic degradation of the system. The theory of breakdown is, at root, simply the recognition that social orders are composed of inherently contradictory relations that, played out in time, eventually generate proliferating engines of entropy that tear those orders apart.

The specifically communist theory of breakdown adds to this two features: first, that social orders based on domination seem to produce sharper conflicts which, though perhaps successful at accelerating the system's material metabolism, also increase its potential entropy; and, second, that specific changes in the social organisation of technology and ecology (i.e., the social metabolism) track the death and birth of material cultures (classically expressed as the link between 'social relations' and 'the forces of production'), which also shapes the form of appearance that those material cultures take in human consciousness, therefore marking out the borders between social systems (as 'modes of production'). As summarised by philosopher Ray Brassier: 'The history of

137 Clarke 1994, p. 280.

138 Though critics would often mischaracterize Grossman as offering a theory of 'terminal' crisis or collapse, Grossman himself consistently claimed the opposite. The bulk of his work is, in fact, focused on the many measures by which capitalist society restores stability and allows accumulation to proceed indefinitely. For Grossman, the 'final' crisis only arises when revolutionary organization has produced a subjective force sufficiently powerful to make use of the various instabilities produced by the breakdown tendency to forcefully overthrow the social order.

humanity, including the history of humanity's relation to nature, is the history of social (re)production. No sensuous datum is merely given; it has always been socially produced (i.e. mediated by a system of social relations, not a concept)' and, following from this, the 'social relation is the source of the materiality of human consciousness,' with the latter serving as the 'inverted reflection' of the former.[139] In Xunzi's terms, the history of humanity is the history of ritual.[140]

Falling profitability and general overaccumulation play central roles here but, as Mattick stresses, the tendency toward breakdown is ultimately 'visible not as such but in the measures taken to counter it.'[141] And, although these countertendencies take many forms, they ultimately boil down to two fundamental effects, as described by Grossman: 'either the value expression of the constant capital having become smaller or surplus value having become larger …'[142] Both can occur through either the extensive incorporation of new resource and labour pools or through intensive, productivity enhancing changes in the technical composition of industry and agriculture. Many theories of crisis focus on the extensive dimension of this process, documenting the many ways in which crises induce new rounds of plunder throughout society and harsher time-discipline in the workplace. But there is no reason to assume that the former (extensive growth) is necessarily of greater magnitude than the latter (intensive growth). In fact, as accumulation increases in scale, technical transformation and the baroque zoning of relative surplus value extraction through increasingly complex value chains prove to be far more important

139 Brassier 2018.

140 Communism itself is thereby not simply another, better 'mode of production' in the simple sense of a novel material culture accompanied by its own totalising ideological mirror, but instead the inauguration of a qualitatively new era of human existence – as Badiou and Bordiga argue, the final end to a pre-history of the species darkened by domination – in which class rule and its long lineage of ideological veneers are broken down through the practical construction of scientific (i.e. anti-totalising) and deliberative (i.e. anti-dominating) mechanisms for the administration of the social metabolism. This also marks a qualitative shift, insofar as it will be the first era in which the social metabolism is brought under the conscious control of society as a whole. Communism is therefore the point at which the species finally brings its own material substructure into accord with a continuously evolving socioecological ethic, harmonising human desire with its own conditions of existence. It is the practical disenchantment of social being – slaying not only the undead demiurge of capitalist society but the deifying ritual orders justifying class rule throughout history – that thereby marks the point beyond which any given mode of production ceases to impose its imperatives back onto society as if it were some external, supervening, and even quasi-supernatural force.

141 Mattick 1981, pp. 55–6.

142 Grossman 2021, p. 249.

methods of restoring accumulation and expanding the field of valorisation to new realms of life.

Similarly, in contrast to what we might think of as the positive countertendencies helping to stave off the breakdown – cheap inputs effectively subsidising profits or, more accurately, making them possible in the first place – Mattick instead emphasises the negative countertendencies, visible in the clearing of capital and disciplining of labour. It is the destructive force of the crisis that ultimately enables the other countertendencies to operate at all. In the short term, the decline in profits is staved off by restructuring production around new technical infrastructures built atop the ruins of the old or in greenfield production sites in new locales, managed by ascendant firms operating in innovative product lines according to novel organisational principles better suited to the increased scale and complexity of the updated production process. Bankruptcies and other balance sheet crises are what allow this restructuring to occur. The process can repeat cyclically, as in the classical Schumpeterian model where each new cluster of firms induces a wave of creative destruction among the old. Over the long run, however, the new physical infrastructures and forms of corporate organisation that emerge eventually become a burden that proves increasingly difficult for the periodic crises of the business cycle to clear.

Though such an outcome contradicts the conventional picture of the business cycle offered by Schumpeter, it is perfectly consistent with Marx's theory of breakdown, in which, according to Clarke, the 'rise in the organic composition of capital plays a much more important role than does any fall in the rate of profit' since it is this rise in organic composition that 'underlies the tendency to the concentration and centralisation of capital' and 'the tendency to the production of a "relative surplus population."'[143] Meanwhile, the very development of these territories also sees established firms build extensive networks within political and financial institutions which then conduct large-scale macroeconomic interventions to prevent bankruptcies and place ailing firms on life support. As Brenner argues, these short-term fixes are necessary measures to prevent deadly depressions in which millions will suffer, and yet, in the long run, these very measures only aggravate the underlying problem. As Clarke notes, the further centralisation and concentration of capital that follow from such interventions 'may reduce the tendency to overaccumulation and crisis by reducing competition, but at the cost of removing the source of capitalist

143 Clarke 1994, p. 243.

dynamism. The alternative to regular crises is secular stagnation.'[144] But, as the case of the electronics industry illustrates, this process of centralisation and concentration mutes competition only in the upper echelons of the supply chain, and only temporarily. Throughout production as a whole, the process actually intensifies competitive pressure and enforces a vicious race to the bottom among suppliers that then induces the same process of centralisation and concentration among these lower-order firms, which are thereby able to deploy their own oligopolistic power to threaten lead firms' monopsonic control of the market.

As a result, firms flail, growth stagnates, and competition grows more cutthroat. Political crises ensue and, eventually, these crises begin to spark wars of increasing size and intensity. War then proves itself the only real means through which to force a widespread recovery:

> Under nineteenth-century conditions it was relatively easy to overcome over-accumulation by means of crisis that more or less affected all capital entities on an international scale. But at the turn of the century a point had been reached where the destruction of capital through crisis and competition was no longer sufficient to change the total capital structure toward a greater profitability. The business-cycle as an instrument of accumulation had apparently come to end; or rather, the business-cycle became a 'cycle' of world wars.[145]

By literally destroying masses of capital, killing off tens of millions of workers, and displacing hundreds of millions more, war cleanses the market of overcapacity, forces the implementation of stockpiled technologies, and liquidates entire swathes of the surplus population while also cheapening the labour that remains. Meanwhile, it assists in both the forcible reorganisation, ongoing centralisation, and more general scaling-up of capital, as larger, more competitive firms (and their new constellations of smaller-scale subcontractors) emerge fattened by wartime contracts and sharpened with technologies produced in state-private partnerships.

Today, it is tempting to see in Africa the final extrinsic geographic and demographic limits that will at last deprive capitalist production of further inputs and thereby force its terminal crisis. This is essentially the theory of crisis (in fact, closer to an exogenous theory of collapse) offered by thinkers like Li Minqi

144 Clarke 1994, p. 242.
145 Mattick 1969, p. 135.

and, to a lesser extent, Jason W. Moore. On the surface, these accounts seem to make sense. If capitalist society is ultimately a form of metabolic exchange, then any sustained decrease in the metabolic input into this system should ultimately starve it, much like an organism might die for lack of food. But, in failing to capture the higher-order properties that emerge only at the social scale, simple metaphors equating the decline of the capitalist order to the death of an organism eventually fall short. As Marx stresses in his liberal use of gothic metaphors, capital is not a living thing bound by the simple binary of life and death. It is instead an arcane, sociospheric system burning through geological strata and channelling the planet's biomass to continually reanimate its undead carapace of machinery, all set in motion by the flow of value through human bodies. The force of capitalist society will therefore prove able to perpetuate itself far beyond its supposedly certain time of death, since social domination can always be imposed rather than silently compelled and accumulation perpetuated through the consumption of its own decay.

This process will give the system an increasingly warlike and even seemingly 'feudal' character in the century to come, even while it remains fundamentally rooted in commodity production. These winters of violence will then induce the very die-off necessary for the system to perpetuate itself via its autosarcophagy. The demiurge first consumes the world and then consumes itself in paired sequences of slaughter and salvage. Growing political, economic, and ecological instability sets free human population, destroys masses of plant and equipment, and even levels entire territories such that new rounds of accumulation can arise through the ruins. Seedlings sprout from the hill of ash. The Bronze Age collapse was ultimately followed by a regional renaissance, laying the first stones in the long road to Rome. Today, even as the IDF deploys military AI algorithms to direct the carpet-bombing of Gaza, the Trump administration and Israeli real estate firms use other AI models to craft mockups of the massive shopping complexes to be built on the ruins. Once the silent dead are encased in cement, the life of commerce can commence. In a simple sense, wars can effectively set back the developmental clock, allowing new frontiers to reopen in areas long ago enclosed. This not only forcibly frees and cheapens certain populations, it also enables warscapes to serve as sites of accumulation, as in the Sudanese gold fields. Wars of the future may even see ruined cities become gigantic centres for the mining and recycling of anthropic mass.[146]

146 But war always dances on the edge of the knife. The line between disciplining the population and liquidating it is a thin one, as is evident in the prospect of a general nuclear conflict. Similarly, in wartime, an enormous portion of the total social capital must be devoted to state functions that are, by definition, unproductive sinks returning little to no

The growing frequency of regional wars may well be developing toward such ends today. But it is more likely that Mattick's 'cycle of world wars' will be inset within the far more expansive environmental catastrophe set to affect essentially all spheres of life in all areas of the world in a similarly destructive fashion, albeit at a somewhat slower pace. What Moore and Li see as the final limit to the capitalist system may, in other words, prove to be its salvation. In fact, climate change might be best characterised as an even more efficient form of rejuvenation than warfare, given that it will eventually induce the total social capital to pursue a total mobilisation against a total enemy that is simultaneously nowhere and everywhere at once. The environmental catastrophe will spawn new wars, induce the development of new technologies, and allow for the deployment of previously untenable methods of reproducing, disciplining, and cheapening labour.

As in all crises, state power will play a central role and, in so doing, will even generate the illusion (yet again) that capitalist production has been replaced by socialistic planning. There is no doubt that the worst effects of the so-called 'polycrisis' will eventually be met with guaranteed production contracts, targeted price controls, expansive stimulus tied to state-led production drives (including warlike mobilisation of 'green' technologies in the face of the climate crisis), outright nationalisation of key enterprises, and even (in certain locations) the return of full employment achieved through some combination of conscription, public works, and targeted social welfare. Nationalistic 'New Deals' will proliferate as the necessary ancillaries of intensified competition operating through regional trade blocs and, eventually, through outright warfare. The era will also see a variety of breakaway states and revolutionary upheavals, some of which may claim to be socialist in character. But the fundamental, functional feature of the process will be much the same as that of a total war: the destruction of enormous masses of capital and labour.

In many cases, this destruction will be a direct outcome of climate chaos and the ensuing ecological collapse. Massive tornadoes will rip through fields and factories, stronger hurricanes will crash into port cities with greater frequency, wildfires hot enough to meld metal will raze billions of dollars of real estate,

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profit. Thus, war itself initially seems to accelerate the breakdown dynamic rather than escape it. And it is a legitimate gamble, since losing the war might mean the annihilation of the entire prewar bloc of capital, rather than its rejuvenation. The ability of war to spark new rounds of accumulation only becomes clear in its aftermath, when state industries are portioned off to private capital, new frontiers are opened for plunder through reconstruction, and fertility rates rebound. This is why the extreme militarisation of WW II was initially mistaken for the death knell of the capitalist system.

drought and disease will decimate crop yields, and ever-deadlier pandemics will rise from the froth of the waste lagoons to stalk the Earth like avenging angels. Given the concentration of industry on the coasts, conservative forecasts (of ~ 2 °C warming, 11 cm rise) predict that, by the year 2100, rising sea levels alone will likely destroy 1.4 trillion USD of crucial infrastructure *every year*. More realistic scenarios (greater than 2 °C warming) predict the annual impact to be anywhere from 14 trillion (86 cm rise) to 27 trillion (180 cm), meaning that between 2 and 3 percent of global GDP would be annihilated annually.[147] Both established territorial industrial complexes such as the Pearl River Delta and ascendant complexes in the Red River Delta, Jakarta, or Dhaka are all set to be inundated. While smaller pieces of equipment can be gradually (if expensively) relocated, billions of dollars of implanted industrial infrastructure will nonetheless sink into the sea. Within the agricultural sphere, these impacts are already visible. Extreme weather accounts for some 80 percent of reported losses in the sector and extreme heat 'can reduce annual yields for farms by as much as 40 %.' In 2015, an extreme drought across the US Northwest caused farmers in Washington state to lose anywhere from 600 to 800 million dollars, according to conservative measures.[148] For major agricultural producers such as India, rainfed rice yields are expected to decline by some 20 percent by 2050 and be nearly halved by 2080, while wheat yields will see similar declines of 19 percent and 40 percent, respectively.[149]

But the indirect impacts may be even more important. For example, declining agricultural yields were a major factor leading to the massive farmers protests in India in 2020–21, in which a general strike was held, and tens of thousands of farmers travelled in caravans to encircle Delhi. The combination of ecological change and political crisis similarly threatens to produce ever-larger flows of climate refugees. An estimated total of 2 to 3 billion people are set to be displaced by deadly temperatures, aggravated natural disasters, and the ensuing warfare by 2100, amounting to between 20 and 30 percent of the forecasted global population at the time. The process is already beginning: 'In 2021, there were 89.3 million people, double the number of forcibly displaced a decade ago, and in 2022 that number reached 100 million, with cli-

147 Jevrejeva et al. 2018.

148 USDA 2024 'The Economic Impact of Climate Change on Northwest Farms', *Climate Hubs: U.S. Department of Agriculture*. https://www.climatehubs.usda.gov/hubs/northwest/topic/economic-impact-climate-change-northwest-farms

149 PIB Delhi 21 March 2023 'Impact of Climate Change on Agriculture', *Ministry of Agriculture & Farmer's Welfare*. https://pib.gov.in/PressReleaseIframePage.aspx?PRID=1909206

mate disasters displacing many more people than conflicts.'[150] In 2022, flooding displaced 33 million people in Pakistan alone.[151] In June of 2024, similar flooding then impacted millions more across Bangladesh, adding to popular anger and thereby helping stoke the protests that then toppled the government later that summer, in a country where nearly 20 percent of the population has now been resigned to the statistical limbo of 'neither work nor education.'[152] By the beginning of that year, the total global refugee population had risen to somewhere between 110 and 120 million.[153] In the US and Europe, this then triggered a series of intensifying migration crises that have slowly seen parties across the political spectrum gradually align behind a program of mass deportation, militarised border enforcement, and even the mass slaughter of migrants through systematic exposure to life-threatening conditions, accompanied by the intentional destruction of water and food resources and the mandated refusal of rescue.

Meanwhile, entire industries will have to be reinvented to accord with the new global reality, rendering an enormous portion of existing capital obsolete and stimulating the development of new machine technologies better suited to electrification and to new forms of agriculture, not to mention new forms of militarised population control. In some cases, this equipment will be needed to produce updated product lines: EV engines in consumer automobiles eventually replacing internal combustion in much the same fashion as LED screens replaced CRT monitors. In others, entirely new technical systems will arise to revolutionise existing industries *in situ*: smart tractors and novel forms of electrified farm equipment for the computer-guided weeding, harvesting, irrigation, crop rotation, and no-till planting necessary to reduce inputs of fertilizer and pesticide in agriculture, likely alongside equipment for precision fermentation designed to biosynthesize major macronutrients for agro-industrial use. In the extreme, the process will also entail state-led megaprojects designed to research and deploy experimental systems for geoengineering.

And it is in this range of technical transformations that we can see the positive impulse to development contained within the widespread demolition of

150 Vince, Gaia 17 November 2022 'Is the world ready for mass migration due to climate change', *BBC*. https://www.bbc.com/future/article/20221117-how-borders-might-change-to-cope-with-climate-migration

151 Ibid.

152 Regan, Helen 6 August 2024 'Bangladesh's "Gen Z revolution" toppled a veteran leader. Why did they hit the streets and what happens now?', *CNN*. https://www.cnn.com/2024/08/06/asia/bangladesh-protests-hasina-resignation-explainer-intl-hnk/index.html

153 According to the data gathered in the UN Refugee Agency's 2023 Global Appeal Report: https://reporting.unhcr.org/globalappeal-2023.

existing capital stock. Pressed by class struggle, the growing externalities of ecological collapse, and their own self-interest, the leading fractions of the capitalist class itself will eventually concede to the necessary measures to force through this restructuring. And they will do so not out of some noble moral duty but because the impacts of climate change will be priced into their own firms' long-run forecasts, made measurable in the capital market via the impact of rising insurance and futures costs on financial derivatives, and of course felt the rising tide of social anomie. More importantly, they will do so because these sectors are simply the sunrise industries with the largest potential for future growth and any who fail to make inroads in these product lines will risk being outcompeted by new market entrants. This ecological revolution will then transmit itself down the industrial chain, such that almost all the foundational sectors of the existing productive complex will, over the next century, be exposed to some degree of ecological restructuring geared toward decarbonisation and electrification – even if this is only achieved by burning even more fossil fuels and intensifying energy use. And, as in earlier shifts from water to coal to oil, the process will again serve as the central theatre in the battle for hegemony.

7 The Wild Side of Life

Merle repeats the chorus one last time: 'If we make it through December / Everything's gonna be all right, I know / It's the coldest time of winter / and I shiver when I see falling snow.' The genius of the song is, of course, its deferred duality. Hope for a warm future is both indeterminate and somehow coextensive with the harsh cold of winter. In Merle's music, as in his life, abjection is itself a rebirth – but always only potentially. It is certainly possible that all the worst of the climate feedbacks may chain together to guarantee that the present environmental crisis destroys the basic material foundations of civilisation, leading to generalised ruin and potentially the extinction of the human species. And yet, short of this, there is no necessary reason that climate change or the enclosure of the globe should constitute what Moore calls an 'epochal crisis,' in which 'one mode of producing wealth, nature, and power gives way to another.'[154]

Instead, these new limits may simply continue to reorient the geography of production and restructure society's reproductive forces, cultivating pro-

154 Moore 2016, p. 125.

ductive knowledge in certain areas, concentrating demographic increase in others, and extending extractive activity in the peripheries, all while crafting new but equally inequitable links of trade and migration between each.[155] The international character of this phenomenon is often described as a form of 'ecologically unequal exchange.' Patterned on the parent concept from dependency theory, the term is here redefined to capture the broader 'asymmetric net flows of biophysical resources from poorer to richer countries.'[156] But the engine of accumulation is not simply fed on 'biophysical resources.' It must, of necessity, be fed on human blood. Attempts to render capitalism as a complex system of material flows make much the same error as those that reduce society to an interlocking sphere of technical systems. Though fundamentally metabolic, modes of production are specifically *social* metabolisms. As Moore argues, this entails an interweaving of social and ecological forces to produce unique historical configurations of 'society-in-nature.' But, even if the natural has ontological priority, the social remains the supervening force. Thus, although capitalism obviously constitutes its own planetary ecology and this ecology is clearly defined by distinct metabolic transfers of biophysical resources, the emergent mesh of mass movement is essentially a proxy for the uneven geography sculpted by flows of a single, fundamentally social substance: value.

155 Certain regions may even take on an essentially reproductive specialisation, operating altogether as something like the brood chamber in the planetary hive of production. In some cases, this specialisation is the informal product of ongoing warfare, conflict, and general underdevelopment, as in the flow of war-stricken Syrian refugees or trade-impoverished Senegalese migrants into Europe. In other cases, local elites insert themselves first as rentiers in the process – as labour brokers, managers of remittance services, etc. – and then even as reproductive entrepreneurs, helping to stimulate, organise, and channel the flow of population outward and money inward. The Philippines is by far the most representative case, with the Marcos dictatorship having first instituted a labour export policy sending workers to the Gulf States in exchange for oil in the 1970s, which then grew into a centrepiece of the national economy over subsequent decades, expanding to include a vast range of occupations such as domestic work, agricultural work, maritime labour on cargo ships and fishing vessels, and even semiconductor fabrication. By the late 2010s and the early 2020s (after a brief dip during the pandemic), the country was exporting nearly two million workers every year. As of 2023, remittances composed some 9 percent of domestic GDP. (See: Delizo, Rasti 16 May 2022 'How Migrant Workers from the Philippines Power Modern Capitalism', *Jacobin*. https://jacobin.com/2022/05/philippines-labour-export-ofws-marcos-duterte-exploitation; Opiniano, Jeremiah M. and Ang, Alvin P. 3 January 2024 'The Philippines' Landmark Labour Export and Development Policy Enters the Next Generation', *Migration Policy Institute*. https://www.migrationpolicy.org/article/philippines-migration-next-generation-ofws)

156 Dorninger et al. 2021.

The question of breakdown is therefore not, at root, a question of profitability, even though this is how it expresses itself within industry. Nor is it simply an issue of the inadequate supply of resources and population drawn from the cycling of natural systems, whether biological, ecological, or geological. Instead, breakdown is essentially a problem of population or, in the terms used by Uno, of capital's ability to produce the peculiar commodity labour-power. The contradictory 'presence of labour within the concept of capital' is therefore what enables an immanent, decompositional drive to emerge within and against development itself.[157] And this force of entropy is simultaneously structural – where it is visible in cost-of-living crises, extraverted development, and environmentally-induced migration – and subjective, as manifest in the tendency of everyday subsistence struggles to generate a political excess that can then be extrapolated into enduring forms of partisanship. As development proceeds, then, it becomes increasingly difficult for the social system to craft a population adequate to valorisation at increasingly larger scales and at a sufficient degree of complexity without also empowering that population to overthrow the very system itself.

Grossman describes the basic limit in much the same fashion as Uno: 'It is in the nature of capitalist accumulation that capital has a constant tendency to outgrow the narrow basis of valorisation imposed by the population.'[158] But this is not an extrinsic demographic limit, in the sense of not having enough cheap labour to staff the machinery of production at a profitable level, as seems sometimes to be implied in the arguments of thinkers like Moore or Li. For capital to perpetuate itself, ever-larger masses of people must be born and made into bearers of labour power. As a result, the social system not only constructs a massive, ever-changing technical carapace encasing the planet but also provides the social infrastructure, material resources, and of course myriad forms of compulsion necessary for humans to gestate new human bodies to serve as adequate vessels for the propagation of value. And yet capital, unable to give birth to human beings or program every feature of their upbringing, can only influence this reproductive process from a distance. As Jason Smith argues, 'the dynamics of accumulation ("the movement of capital") do not directly shape the "movement of the population." It is in the gap between these two movements that states intervene to adjust household behaviors, and population growth, to the needs of accumulation.'[159] And it is also in this gap that

157 Bonefeld 1999.
158 Grossman 2021, p. 331.
159 Smith 2024.

the breakdown tendency ultimately manifests, as both a general crisis of social reproduction and a specific crisis in the reproduction of labour-power as a commodity.

Initially, it appears as if the mutilation of productive subjectivity and the baroque subdivisions that define the distribution of specific forms of productive knowledge are an obstacle that grows only more insurmountable as the material superstructure of production is further developed. As domestication advances, the defeated find only diminishing means for revolt. Deprived of access to the internal language of production, the majority of the population is therefore left to waste away beyond the walls of the castle. Even worse, the nesting of these material divisions then pits different subsistence struggles against one another. In other words, rather than progressively socialising work and workplace struggle, the development of capital seems to instead *desocialise* labour and thereby undercut the basis for collective agency. The warm dream of California proves to be little more than a distant bonfire glimpsed through a blizzard, slowly buried in snow.

One response to this conundrum is to emphasise the intentional construction of an essentially mythic universality through voluntaristic political intervention. Sometimes, this approach displaces subjectivity onto some third party that, due to its structural position, is capable of better representing the extremes of proletarian dispossession (usually a uniquely abject population such as prisoners, war refugees, migrants, slum-dwellers, etc.). Militants then step in from all walks of life to act alongside (at best) or in place of (at worst) this privileged subject. Another alternative is to limit the subjective force to the moment of rupture itself, or at least the antepolitical non-movement that it initiates. Since every upwelling of the historical party offers its own practical unity in the midst of the riot or at the heart of the occupied zone, a makeshift universality can always be constructed on purely pragmatic and temporary basis. Nonetheless, even this contingent unity is also too easily mythologised, such that the donning of masks seems to dissolve preexisting identities and the sharing of food to prefigure the coming community.

Ultimately, however, material separations do not melt in the heat of insurrection. Nor does voluntaristic political action exceed the basic limits of the populism in which it operates, which is precisely why it is so easily overtaken by right-wing forces seeking to construct a practical unity under the sigil of localism, nationalism, or some sort of salvific religious community-to-come. How, then, does subjectivity span the divide between a rudimentary determinism rooted in the productive activity of a dismembered 'general intellect' and a voluntarism in which political agency is effectively severed from material reality and made to operate as a sort of mystical force? Breakdown itself resolves the

riddle, insofar as we understand it to be a determinate, structural trend visible in all the conventional forms of crisis and, simultaneously, a process that generates a subjective field of probability through which forms of political agency can take shape that are then able to reflexively intervene back into their own conditions of possibility.

In other words, no matter how spectacular, neither individual crises nor the long-run development of the productive forces will ever generate an automatic breakdown of capitalism. Nor is it possible to construct a purely voluntaristic form of revolutionary subjectivity through an ethic of militance detached from its material conditions. But the combination of demolition and development does, over time, produce the material probability – increasing, on average, over the long run, despite the deep troughs that follow repression – that an expansive process of revolutionary composition or subjectivation will take shape that is then able to span both moments, enabling any given era (whether one of decline or one of development) to serve as the 'final' or 'epochal' crisis of the social system as such. Breakdown thereby manifests not in purely structural forces but instead in the material process of subjectivation, generating a revolutionary force that can at last induce the end of the social order through a protracted war against its rituals. Subjectivity is therefore neither reducible to nor independent of the material situation that produces it. It is the self-referential circuit through which the material world is interlocked with the minds that it produces in contradiction to itself, each shaping the other unequally, the latter negating the former as the mind rebels against its conditions, and both negated by the very process that spirals up out of their interaction.

This requires no catastrophic collapse of the system, other than that induced through the very act of an organised revolutionary refusal. Throughout, individual crises may seed future partisan struggles, and, developed to the point of outright conflict, these crises may also open the field for pre-existing partisan projects to build their power. But, just as often, the crisis itself serves to wipe out working-class organisations. By contrast, the breakdown tendency – which is ultimately capitalist development itself churning forward through many cycles of boom and bust – is expressed in the underlying unity between periods of crisis and the periods of development that they induce. In this sense, subjectivity is enabled less by specific moments of crisis and more by the long-run development of the productive forces. However, as Tronti reminds us:

> The level of the productive forces is not measured by the level of technological progress, but instead by the working class's degree of revolutionary

> consciousness. Or, better: the first is the capitalist's measure, conceiving the worker solely as a human appendage of his machines; the second is the organised workers' movement's measure.[160]

After all, it is the intensive development of manufacturing technologies that have cast so many millions out into the surplus population and trapped poor countries in conditions of 'premature deindustrialization,' where massive populations of young people find themselves with few avenues of formal employment or training in productive industries. It should be little coincidence, then, that these are precisely the populations currently staffing 'Gen Z Revolts' in countries as far afield as Kenya and Bangladesh.

In other words, the breakdown tendency not only produces specific crises and increasingly open forms of conflict but also creates the rudimentary material conditions for feral subjectivities to form as an immanent force within the very process of domestication, visible in the recurrent upwelling of the historical party and its expression of an invariant communist content. In retaining fidelity to the excess of these events, formal parties emerge, evolve, and eventually cohere into a larger partisan ecosystem (i.e., the communist party) that both retains and refines that feral impulse. The political trajectory of every period of crisis and conflict is therefore set by the intentional activity of certain fractions of the class – who are also always the *de facto* inheritors of a specific historical sequence of organisation, whether acknowledged or not. The communist character of these efforts can only be determined by the degree to which any given organisational practice acts as an engine of decommodification or, at the very least, aims at some immediate strategic horizon where decommodification would be the practical outcome. Insofar as they are able to express that invariant communist content within a given context, they are communist measures, regardless of their exact form.[161]

And yet the material features of production also remain essential to the concrete process of decommodification: by inducing the intensive develop-

160 Tronti 2019, p. 33.

161 Since these measures are inherently contextual and defined in the negative – as methods for decommodification and the dismantling of social domination – it is impossible to determine their exact character ahead of time or select a subset of universally applicable practices that can simply be transposed between situations. Determining what is and is not a communist measure is therefore a matter of political experiment. Although certain functional capacities already visible today such as deliberative decision-making and labour-time accounting will very likely play a role in decommodified forms of reproduction, it is also possible for seemingly communistic practices such as direct democracy to serve, functionally, as tools of repression.

ment of technologies that reduce necessary labour and economise on energy and resources in the process of production, capitalist society creates both a mass of practical use values and ensures that they cannot be put to use for human wellbeing. As Clarke notes, 'the underlying cause of all crises remains the fundamental contradiction on which the capitalist mode of production is based, the contradiction between the production of things and the production of value, and the subordination of the former to the latter.'[162] Similarly, the development of the forces of production forms an advanced collective consciousness embodied in the Promethean figure of the general worker only to then subject this figure to an equally Promethean torture by disembowelling it through brutal divisions of labour. These conditions then create a glaring ethical disjunction, as increasing numbers of people cannot help but notice the gap between what is possible in a technical sense and what is permitted by the convoluted rituals of accumulation.

Rather than unfettering the forces of production, then, we might better conceive of communism as unfettering the forces of *reproduction*. Already, the very expulsion of workers from industry and into the service sector means that, over time, a larger share of the population is employed in fields such as education, healthcare, food service, and in various other forms of care work. And yet these occupations are often deeply contradictory, imbuing those who perform them with practical forms of reproductive knowledge that are then immediately hamstrung by the imperatives of accumulation. Every one of these jobs trains workers to provide care and then places them in settings where those who need that care the most are systematically deprived of it, by design. In this way, reproductive occupations openly counterpose the immensity of our social wealth to the relative dearth of educational, emotional, and physical support offered to those who need it. This is precisely why issues such as healthcare coverage, affordable housing, access to education, the abolition of student loan and medical debt, opposition to environmental devastation, and the revival of regenerative ecological practices are all increasingly central features of contemporary struggles.

Moreover, in practical terms, decommodification is often already a natural extension of subsistence struggles within the reproductive sphere. We might even say that such struggles imply an essentially communist horizon, at least in negative. This is especially true of environmental conflicts led by indigenous peoples attempting to defend traditional stewardship practices against the deepening of market relations. Similarly, in Sudan, it is hardly a coincidence

162 Clarke 1994, p. 285.

that the revolution was triggered by revolts among futureless high schoolers and impoverished workers, stoked by associations of teachers and medical staff, and then extended across the country in the form of neighbourhood resistance committees that drew in young proletarians across the sprawling informal sector. Despite the 'lack of a revolutionary vision among the protestors' given the 'absence of any revolutionary party capable of revolutionary theorization and of introducing a counter discourse,' these forces nonetheless proceeded to unfetter their own reproductive capacities directly, running kitchens, schools, and hospitals, restoring internet access in the face of government censorship, and eventually coordinating migration networks to evacuate people from the warzone *en masse*.[163] But the basic trend is also visible in increasingly popular reformist programs seeking free healthcare, expanded maternity and paternity leave, or even universal social protection, all of which already indicate the basic limits of both privatisation and state services skimmed from the froth of accumulation.

Though none of these struggles are inherently communist in character and all can ultimately be woven back into the circuits of capital, the breakdown tendency will nonetheless enhance the prospects for communist power to be built in and beyond them. In the majority of the world, the greatest challenge faced by the current generation will be to figure out how, exactly, traditional developmental outcomes – such as industrialisation, decreased mortality and morbidity, expanded educational infrastructure, and widespread access to clean water, reliable electricity, and open internet – can be advanced through decommodification, rather than via compradorial compacts with the 'international community.' Despite their failures, the neighbourhood resistance committees of Sudan likely remain the most advanced experiment in this direction, signalling how widespread forms of reproductive knowledge might be mobilised in a decentralised and deliberative fashion. The case of Sudan also demonstrates the difficulty in achieving the strategic balance necessary to advance the revolution by harmonising the offensive and defensive features of the conflict. Sacrificing the social war represented by decommodification to the harsh necessities of the literal war for survival will ultimately result in the reduction of the communist party to a merely military apparatus that cannot help but regenerate its own forms of social domination, from which an elite will emerge eager to reintegrate with the capitalist world on their own terms. Similarly, overeagerly sacrificing military capacity to serve social transformation will leave such zones without any defence against the terror of reconquest.

163 Alneel 2021.

I put the empty beer glass down on the sun-bleached plastic table and stood in front of the honky-tonk. Merle's voice echoed out over the potato fields nestled in the narrow mountain valley where currents of heat coursed through the air like blood through flesh: 'If we make it through December / Got plans to be in a warmer town come summertime.' As the sun rose to its apex and the light poured golden from its vessel, the traffic on the old dirt road seemed to grow, turning wheels and thundering feet kicking up a cloud of honey-heavy dust – the ancient amber whorl of people passing through this world toward their bright annihilation. I stood up and walked into the cloud, feeling my way down. Bodies jostled against me, but I could no longer make out any faces. We all seemed to be moving together somewhere, close enough to smell breath and sweat but also too far to reach anyone in the haze of humanity, moving like a tide over the gold fields, over the cash crops, over the graves silent underfoot. And yet I could feel the presence of others, or of myself in others and of us all together as something more moving down the mountain toward the dark valley where history waits. Engines sounded in the distance. Tools clanged against rock. Sparks bloomed behind the veil. Each figure dimly glimpsed seemed some cryptic guardian. And beyond, the labyrinth that looms before the species. Though solemn, it was not a sad march. Voices danced in the light, sweet Arusha rhythms weaving with the Bakersfield twang: 'Maybe even California …' The old dirt road seemed soft, familiar even. As if we had been here before and would pass this way again.

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