

INSIDE THE BRIC: ANALYSIS OF THE SEMIPERIPHERAL CHARACTER OF BRAZIL, RUSSIA, INDIA AND CHINA

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Introduction

Every approach and development of the World-Systems Theory is carried out in a structured time-space *continuum*. Concerning the spatiality, this theory understands the world in a stratified and hierarchical way on three areas: core, semiperiphery and periphery². Such division “is not merely functional – that is to say, occupational – but also geographical.” (Wallerstein 2003a, 492) That understood, the world-systems’ observed areas are not only a theoretical construct in order to understand the international division of labor but also real, authentic, historically built and spatially established geographical areas, whose differences – sudden or not – do exist, “as point the price criteria, the wages, the life levels, the gross domestic product, the *per capita* gross and the commercial balances” (Braudel 1984, 22). As David Harvey explains, these areas “are perpetually reproduced, sustained, undermined and reconfigured by the socioecological and political-economic processes that lie on the present” (Harvey 2000, 98). It indicates that the spaces do not belong to a single area anymore, but that the processes are “what structure the space” (Taylor and Flint 2002, 21) in an unstoppable and perpetual way.

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² Very broadly, the periphery of the world-system features “the lowest wage levels and nullified or scarce own technological developments, putting the most brutal, stark and extenuating forms of work exploitation in practice, along with the highest levels of poverty and absolute or relative misery, besides the general scarcity of available goods.” (Aguirre Rojas 2003, 45)

Immanuel Wallerstein sustains that the semiperiphery “is not a statistical cleavage artifice, nor a residual category. The semiperiphery is a structural element necessary in the world-economy” (Wallerstein 2003a, 493). Thus, the concept of semiperiphery ends up being an analytical category of great importance to cover the theoretical dichotomous blank existent in the core-periphery model.

Initially, nonetheless, the semiperiphery could be seen simply and plainly as a defined zone from the denial of the core and the periphery, that is to say, as a concept full of indetermination and ambiguity. And effectively the semiperiphery and the semiperipheral states form an amorphous group. Facing this, how to identify the semiperiphery and the semiperipheral countries in the present international context of the Post-Cold War? What are the particular characteristics of such areas? Where does its potential to remake the world-system lie? Which countries can be considered as semiperipheral states? What specificities do such states show in the interior of their national societies?

The objective of this investigation is to do a broad revision and reconstruction of the concept of semiperiphery, where the original ideas of Immanuel Wallerstein can be articulated to the developments made by other contemporaneous world-systems theorists. Once this goal is accomplished, the study of the semiperipheral nature – both internal and systemic – of the so-called “BRIC” countries (Brazil, Russia, India and China) in the international context of Post-Cold War.

1. Theoretical characteristics of the concept of semiperiphery

The characteristics and roles of semiperiphery in the world-system are going to be firstly exposed by Immanuel Wallerstein throughout its work “The Modern World-System” and right after in other books, essays and supplementary material. This idea has been complemented and discussed by other authors – like Fernand Braudel, André Gunder Frank, Janet Abu-Lughod, Giovanni Arrighi and Jessica Drangel, Christopher Chase-Dunn, Peter Taylor and Colin Flint, Kees Terlouw, Ben Deurdder, José Mauricio Domingues, Carlos Antonio Aguirre, and Peter Wilkin, among the most important ones –, who have also provided some feedback and gave to the semiperipheral conception a theoretical range much broader than the originally proposed.

1.1. Intermediate situation between core and periphery

In the first volume of “The Modern World-System” – which is called “The Capitalist Agriculture and the Origins of the European World-Economy in the Sixteenth Century” and was first published in English in 1974 – Immanuel Wallerstein approaches the existent conditions when of the origins of the world-system, between 1450-1640. Here, the semiperiphery is characterized as areas that were able to differentiate themselves from the periphery because of reasons like the past presence of many and relatively powerful merchants, the existence of a strong national bourgeoisie, the partnership’s practice³, the high land/workforce index and the partial proximity to the agriculture self-sufficiency, though with rifts and falls of the industrial activities.

Before concluding this book, Immanuel Wallerstein presents a theoretical reprise and unveils its reference mark for the systematization of the gathered empirical material. It is in this section where his definition is extended and the author notes that the semiperipheral areas

“play a role parallel to that played, *mutatis mutandis*, by middle trading groups in an empire. They are collection points of vital skills that are often politically unpopular. These middle areas (like middle groups in an empire) partially deflect the political pressures which groups primarily located in peripheral areas might otherwise direct against core-States and the groups which operate within and through their state machineries. On the other hand, the interests primarily located in the semiperiphery are located outside the political arena of the core-States, and find it difficult to pursue the ends in political coalitions that might be open to them were they in the same political arena.” (Wallerstein 2003a, 492-493)

In the interstate-international system, the semiperiphery is understood as “a significative number of States that seems to be permanently in an intermediate position between the ‘maturity’ and the ‘backwardness’, like the theorists of the modernization could say, or between the ‘core’ and the ‘periphery’, like the dependence theorists could say” (Arrighi and Drangel 1996, 9). This intermediate situation has exclusively nothing to do with the

³ Though it can be understood as the local peasants’ capacity to negotiate the benefits resulting from the crops with the land owners, it can also be seen as the service of the tenants in order to guarantee themselves protection against famine and the social status that the land ownership used to represent.

international division of labor⁴, as it also is related to a geoeconomic and geopolitical function in the interstate-international system, once “the geography of the world-system surely interferes in a decisive way” (Amin 1998, 215).

1.2. Industrializing national economies

The capitalist world-economy was throughout history built

“on a worldwide division of labor in which various zones of this economy (that which we have termed the core, the semiperiphery, and the periphery) were assigned specific economic roles, developed different class structures, used consequently different modes of labor control, and profited unequally from the workings of the system.” (Wallerstein 2003a, 229)

Albeit a geographic-functional division in the world-economy exists, Giovanni Arrighi and Jessica Drangel clarified that

“no particular activity (whether defined in terms of its output or of the technique used) is inherently core-like or periphery-like. Any activity can become at a particular point in time core-like or periphery-like, but each has that characteristic for a limited period.” (Arrighi and Drangel 1986, 18)

When dealing with the core-semiperiphery-periphery situations of ever-changing and transitory realities, will be interesting to observe in the world-economy not exactly the type of activities that are put in practice, but the vanguard/lag that could happen creating and developing the processes of industrialization.

The semiperipheral economies are characterized by the introduction of new goods, new energy sources, new methods of production and organization, although not in an innovative way, but reproducing and adapting what has

⁴ From the World-System Theory it is assumed that labor is internationally integrated in a series of production chains. It is here emphasized that “in the distribution of the total product, not in the production factors, but between the various knots of the production chain” (Arrighi and Drangel 1996, 16).

already been developed, patented and also refined in advance by the core economies. Nonetheless, inside the semiperiphery – when it refers to an area spatially localized in between the core and the periphery – there will be a mix of productive activities extremely differentiated to such an extent that Christopher Chase-Dunn identifies “two types of semiperipheral areas. In Type 1 there is a balance of both core and peripheral types of production within the boundaries of a single state. In Type 2 there is a preponderance of intermediate levels of capital-intensive production.” (Chase-Dunn 1990, 2)

Throughout the twentieth century, the semiperipheral economies have been in the process of mastering the second industrial revolution, started during the second half of the nineteenth century in the core of the world-economy and that was characterized by: the discovery and the massive utilization of sources of energy never seen before (like gas or petroleum); the emergence of new and improved techniques of production, thanks to progresses in electricity and mechanics (especially related to the internal combustion engine and the mechanic refrigeration); the emergence of new industries, like the chemical, the metallurgical or the automotive; the electrification; the invention of the telephone and the amplification of the telegraph; and also the mass production of consumer goods. In the actual context, in addition to control the second industrial revolution, the semiperipheral economies launched the path towards the third industrial revolution (Rifkin 2012), which is led nowadays by the core economies.

Now, with regard to the global chains of production, the semiperipheral economies have access to, are part of and enjoy their usufructs, but are not able to control the access to the most profitable gains. The core States and their enterprises are the ones which dominate the more profitable chains and the strategic nodes⁵ of the whole world-economy through an aggressive and expansive mercantilist policy. Differently, the semiperipheral states practice

⁵ Immanuel Wallerstein explains that “the activities of the more profitable nodes have tended to be geographically concentrated in a few, relatively small areas of the world-economy, which we may call collectively the core zone. The less profitable nodes tend to have their units of economic activity more geographically dispersed, most of these units being located in a much larger area we may call the peripheral zone.” (Wallerstein 2008, 106)

self-assuring economic policies, in order to keep themselves in the semiperiphery, and defensive policies, in order to conserve the conquered markets and avoid to be marginalized towards the periphery.

In respect to their national economies, Giovanni Arrighi and Jessica Drangel add that the semiperipheral states “(1) export the most diverse kind of products, (2) are characterized by the most diverse wage levels (and, in as far as we can tell, profit margins), and (3) pursue the most diverse policies toward the internal and world markets.” (Arrighi and Drangel 1986, 14) For that matter, it is possible to point out, firstly, that in the semiperipheral economies are not characterized by the exports the primary, secondary or tertiary goods, but by the incursion in all kinds of industries without, however, be part of the vanguard in any of them nor control the nodes of the most profitable chains of production; secondly, that the people’s income is, on average, of a medium level – in such a way that “should have a GNP *per capita* which is roughly intermediate in the distribution of cross-national comparisons” (Chase-Dunn 1990, 19) – and the consumer levels are equally average, though all of them with large distributive inequalities; third, that there is not a development model in the semiperiphery, but that there is a diverse myriad of strategies, options and paths.

For Edward Kick and Byron Davis, the intermediate situation of the semiperiphery in the world-economy would be then perpetuated by “(a) its economic domination over the periphery, which includes the exchange of finished goods for raw material products, and (b) its economic dependence on the core through foreign investment.” (Kick and Davis 2001, 1563) Hence the semiperipheral economies are subject to much stress and competence, more than any other area of the world-economy. In the words of Kees Terlouw, “the semiperiphery maximizes the necessity and lack of development” (Terlouw 2003, 77), in such way that it becomes at the same time viable and plausible that “new organizational forms, activities with very different logics of operation, are likely to emerge first in semiperipheral areas where both core and peripheral forms are combined and development is subjected to very contradictory forces.” (Chase-Dunn 1988, 34)

1.3. State apparatus in process of modernization

Immanuel Wallerstein clearly identifies two elements constituents of the modern world-system: on one hand, the world-economy in which each zone has its specific assigned roles; and, on the other hand, the political activity that “occurred primarily within the framework of states which, as a consequence of their different roles in the world-economy were structured differently” (Wallerstein 2003a, 229).

The *raison d’être* of the state has been and is to assure the survival of its national society (argument that has been perpetuated in the idea of sovereignty). However, in the last decades, the security has been seen in an increasingly broader way, interlinking it with the idea of human development. Rightly, “when problems like welfare or progress are raised, we tend to look to the development policies” (Barkin and Lemus 2011, 112) and, in this sense, results in state obligation not only to guarantee security, but also all the means possible so that its citizens are able to enjoy a long, healthy and decent life.

That said, a capable and competent state apparatus is essential to social development. In that regard, Immanuel Wallerstein notes that “The tax revenue enables the state to have a larger and more efficient civil bureaucracy and army which in turn leads to greater tax revenue” (Wallerstein 2003a, 500) in a process that continues *in crescendo*, though that phenomenon can also be observed in the other direction, that is to say,

“in those states in which the state machinery is weak, the state managers do not play the role of coordinating a complex industrial-commercial-agricultural mechanism. Rather they simply become one set of landlords amidst others, with little claim to legitimate authority over the whole. (Wallerstein 2003a, 501)

A semiperipheral state would, then, show intermediate governmental and bureaucratic aspects between fortress and debility, “while experiencing colossal transitions in national institutions and human capital outcomes.” (Kick and Davis 2001, 1563)

In respect to the state apparatus that are found in the semiperiphery, the direct and immediate interest is that of economic and social control, including in a much stronger way than in the core, where there are strong and historically consolidated state apparatus, or in the periphery, practically devoid

of them. Christopher Chase-Dunn explains that “whether leftist or rightist, upwardly mobile semiperipheral countries tend to employ more state-directed and state-mobilized development policies than do core countries.” (Chase-Dunn 1990, 5) It means that, due to the blend of capitalist activities in the semiperiphery, development and governmental policies with very opposite interests have surged, though – in their majority – characterized by the state control.

Notwithstanding such controlling vocation, the semiperipheral states’ apparatuses are inefficient in terms of tax revenue capitation, which has the consequence of currently lacking liquidity in order to guarantee social welfare. Besides, being the institutions⁶ fundamental to bring lawfulness and legitimacy to the actions made by States, the insolvency of governments’ apparatuses restricts and relaxes the modernization processes of their national institutions, which opens the door to corruption, impunity and illegality. It is worth noting that a state arbitrarily exerting its authority and systematically violating the rights of its national society not only brings internal volatility and instability, but also deteriorates its own image before the world, being susceptible to international interference and pressure.

As alerted by Peter Taylor and Colin Flint, the opportunities of change that are produced in the system “are connected to the political processes that are very important when it is time to triumph or fail in the world-economy.” (Taylor and Flint 2002, 22) Thus, semiperipheral states are in the checkpoint where two different paths emerge: to advance their democratic processes, the enhancement of their governmental institutions, the protection of human rights, that is to say, to aim the conformation of state apparatuses similar to the ones from core States; or to see themselves incapacitated to keep the rule of law, to move backwards towards the arbitrary exercise of authority and human

⁶ According to Martín Krause, institutions are understood as “norms that allow us to coordinate the actions of every individual in society, the ones that give us the predictability in respect to the actions of everybody else. Customs and practices origin expectations, which in turn guide people’s actions, and these practices that one expects to observe are what is normally known as law. The authority of (or the support to) a legal system ultimately derivates from the feeling that it is ‘right’ due to the fact that it matches the expectations.” (Krause 2007, 7)

rights violations, to decrease their institutional quality – in sum, to subsume in the processes of peripheralization.

In respect to their resources' protection, Kees Terlouw adds that the “combination of lax regulation and strong developmental pressures makes the semiperiphery vulnerable to ecological destruction.” (Terlouw 2003, 77)

1.4. Socioeconomic inequality and internal disparity

In the semiperipheral societies coexist welfare levels comparable to the ones from core societies, with peripheral circumstances of precariousness and lag. Huge socioeconomic inequality is definitely one of the features, but also one of the main problems that hunt semiperipheral societies.

Nonetheless, the inequality displayed by this countries is not just a inequality of grosses between different social classes, but also the existence of monumental disparities of development and welfare between different intrastate spatial zones: between urban and rural areas, between commercial/financial centers and undeveloped suburbs, between residential neighborhoods and shanty towns, etc. And, despite the fact that the national state is the most important entity when of studying global and international phenomena, Kees Terlouw underlines that “the world-system is characterized by semiperipheral development at different scales, periods and types of social space” (Terlouw 2003, 72). Semiperipheral states are usually treated as “a whole”, and this is the reason why, in order to better understand the specificities and dynamics of the semiperiphery, it is important to analytically break into the subnational scales of the state.

The research network GaWC distances itself from the traditional statecentric perspective of International Relations in order to aim a global analysis of the world focused on the cities. According to GaWC,

“cities are assessed in terms of their advanced producer services using the interlocking network model. Indirect measures of flows are derived to compute a city's network connectivity – this measures a city's integration into the world city network.” (Globalization and World Cities Research Network s.d.)

This way, research network GaWC finds out that metropolis show different approaches and repercussions in the globalization processes. Thus,

each city of the world receives a category that rates them as a Alpha (Alpha ++, Alpha +, Alpha and Alpha -), Beta (Beta +, Beta and Beta -) and Gamma (Gamma +, Gamma and Gamma -).

The semiperipheral states have managed to project and position a number of cities in the Alpha category, keeping a strong interconnection with the big metropolis and capitals of the core through this achievement; on the other hand, such Alpha cities from the semiperiphery display relative lags on infrastructure, as well as strong socioeconomic contrasts both in the interior and the geographically nearby zones, though.

All these strong disparities and inequalities convert to the semiperiphery in geographical zones of much social stress and natural spaces to the birth of alternative and anti-systemic movements. For Christopher Chase-Dunn:

“more stratified semiperipheries are likely to produce social revolutions which challenge the logic of capitalism, while relatively less stratified and politically liberal semiperipheries can achieve the degree of class harmony necessary for upward mobility within the capitalist world-economy.” (Chase-Dunn 1990, 9)

1.5. Attractive and influent (not dominant) geoculture

What is understood by geoculture? In response, Immanuel Wallerstein writes:

“Some describe geoculture as the superstructure of such world-economy. Personally, I rather think about that behind the latter’s scenes, the most hidden part, and thus the hardest to value, but whose existence makes it subsist. I call it ‘geoculture’ as an analogy to geopolitics not because it means a supralocal or supranational aspect, but because it represents the cultural mark inside the one which operates the world-system.” (Wallerstein 2007, 23)

Dominant geoculture has been characterized by the diffusion of the liberal ideals as universal values and the promotion of market with worldwide scope. However, such geoculture is found – since the 1968 revolutions – questioned, weakened and currently in crisis.

As well as modernity allowed thinking the joint emancipation of traditions or ideologies inherited and not problematized by the Middle Age, the

decline of the modern era – that would evolve and deepen throughout the second half of the Twentieth Century – is distinguished because of: a bet on the individual progress, where the only possible revolution will be the interior; the birth of huge critiques and changes respect to religion; the search for the immediatism and the disappearance of idealisms; questions on the modern sciences and the positivism as true knowledge generators; the emergence of a cult to technology and “informationalism” (Castells 2005a, 27-53); a desacralization of politics and loss of faith on leaders; capitalism evolving from a production economy to a consumer economy; communication ceasing to give importance to content of messages and valuing the way of emission; mass media becoming transmitters of “truth” and powerful instruments of power; and a revaluation of nature and the environment. These are some significant points. But it is within this context, where the geocultural values cover a significant importance, mostly because

“When the local strata are threatened by any incipient class-consciousness of lower strata, emphasis on local culture serves well to deflect local internal conflict, creating instead local solidarity against the outside. If, in addition, these local dominant strata feel themselves oppressed by higher strata of the world-system, they are doubly motivated to pursue the creation of a local identity.” (Wallerstein 2003a, 497)

Now, how is the given geoculture diffused and disseminated? Some media escape the state, like the cinematographic industry that form the entertainment sectors, for example; however, there are other media that depend directly on the state funds and are part of public policies. In this way, dominant geoculture has been developed in almost exclusively by the core States that own such media.

Nonetheless, the largest and most developed semiperipheral states have achieved throughout the decades projecting alternative geocultural values that also result encouraging – both for core and peripheral societies –, but are unable to be dominant in the world-system.

1.6. Discordant social forces

The semiperipheral societies are characterized by being meeting and discordance points between centralizing and peripheralizing social forces.

From the social and human development point of view, semiperipheral societies find themselves in an intermediate point between the core and the periphery: in comparison to the periphery, most part of semiperiphery is more educated, healthier and more advanced technologically; however, in respect to the core, semiperiphery shows huge gap and considerable lags concerning welfare and development levels.

According to Fernand Braudel, one of the simplest criteria to identify the importance between different zones of the world-economy is “the presence or otherwise, in a given region, of colonies of foreign merchants. If he rules the roost in a given city or region, the foreign merchant is a sign of the inferiority of that city or region, compared with the economy of which he is the representative or emissary.” (Braudel 1984, 22-23) The semiperipheral zones, finding themselves in an intermediate situation from the international division of labor and the geographical points of view, work as natural spaces of migrants’ attraction, both from the core and the periphery. With the same wording, Mattheu Mahutga and David Smith suggest that “semiperipheral countries are more attractive places for industrial migration than the core and peripheral countries.” (Mahutga and Smith 2011, 258)

Core agents that migrate to semiperiphery contribute to the decentralization and the replacement of resources towards more profitable areas. Such mobilization goes on supported of a willing to control – by the core agents side – societies and the governmental decisions that, however, is not that fundamental as it is in periphery due to the fact that in semiperiphery exists a strong national bourgeoisie supported by controlling governments.

By their own part, peripheral agents that migrate to semiperiphery proceed aiming to reach the core zones of the world-economy. Nonetheless, the physical and policy barriers raised by core States end up stopping the migratory fluxes, stagnating them in the semiperiphery and, therefore, allowing them to be absorbed by these zones. This process – allied to many others – makes the semiperipheral growth “grows faster than both the core and the periphery – corresponding to a particular phase in long term Kondratieff cycles of world-economic expansion and contraction” (Mahutga and Smith 2011, 258)

1.7. Complementary actors in the world-system governance

According to Peter Taylor and Colin Flint, the semiperipheral positioning between core and periphery is “more political than economic, once it is the intermediate crucial zone in the spatial structure” (Taylor and Flint 2002, 22), and therefore “the structural position of semiperiphery necessarily implies the presence of stronger global links than the peripheral ones.” (Kick and Davis 2001, 1563)

Samuel Pinheiro Guimarães considers that the objective of the core States is “to guarantee that their political, military and economic developments do not affect their local, regional and global interests” (Pinheiro Guimarães 2004, 17). Certainly the core States – simultaneously – compete and help each other for the geopolitical control and geoeconomic exploitation of the world-system. In order to do that, they rely on the semiperipheral States, entities that find themselves in a geographically intermediate position, so that they operate as unpopular spaces in the contention of pressure coming from the periphery towards the core. However, it does not erase the importance of semiperiphery in the world-system governance.

Differently from the core states, the semiperipheral states lack high welfare and socioeconomic development levels, which stop them – at least in the short and medium run – to guarantee global public goods and to determine a totally favorable political climate for their own interests in a global level.

Nonetheless, the semiperipheral states count on huge and dynamic national markets, sufficient territorial extensions, large armies and considerable levels of commercial interchange. It allows them – besides guaranteeing their territorial protection and preventing invasion attempts – creating infrastructural projects inside and outside their frontiers, ideating socioculturally in regional spaces, exercising leadership and eventually supremacy among their neighbors, impelling integration systems and deploying a proactive foreign policy in defense of the regional interests.

It is worth to advert that, even though they do not find themselves in position to politically and militarily compete for the world-system supremacy, the quick rising of some semiperipheral states in the international structure and their revisionist attitude have been stimulating some core states “to institute wide economic aid and military assistance programs whilst providing

conventional and non-conventional weapons to core-inclined regimes” (Kick and Davis 2001, 1564), in a try to coopt those States and to reduce their growing regional and global influences.

1.8 Significant transforming potential

In terms of changeable potential, it is the semiperiphery the most relevant and crucial area, because “the core States can convert into semiperipheral ones and the semiperipheral into peripheral” (Wallerstein 2003a, 493), in such way that this area “plays an important role in the mobility of the world-system” (Terlouw 2003, 72). Moreover, according to Christopher Chase-Dunn the semiperipheral states and regions “are unproportionally the locus of huge social changes agents” (Chase-Dunn 1988, 57) and the space where “interesting political movements are more likely to emerge” (Chase-Dunn 1990, 9).

In order to explain the happening of such semiperipheral areas, Immanuel Wallerstein proposes two answers in the first volume of “The Modern World-System”: that they can correspond to zones that “had been core-areas of earlier versions of a given world-economy” (Wallerstein 2003a, 492), that is to say, “antique central areas in evolution towards peripheral structures” (Wallerstein 2003a, 144); or they could “had been peripheral areas that were later promoted, so to speak, as a result of the changing geopolitics of an expanding world-economy” (Wallerstein 2003a, 492).

The previous idea is continued and amplified by Immanuel Wallerstein in the second volume of the same work – published for the first time in 1980 under the title of “Mercantilism and the Consolidation of the European World-Economy, 1600-1750” – in which his objective is to study the process of the consolidation of the world system. Here, it is explained that the changes in relative economic strength “can be viewed (and indeed most often are viewed) as a sort of upward or downward ‘mobility’ of the state as an entity, a movement measured in relation to other states within the framework of the interstate system” (Wallerstein 2003b, 247). Thus, “semiperiphery would not be a fixed position, but a country’s promotion/relegation point” (Domingues 2012, 18), once “there are no semiperipheral processes; more specifically, the word ‘semiperiphery’ applies directly to zones, regions or States where the processes of the core or the periphery do not prevail” (Taylor and Flint 2002, 22).

Hence, two polarizing forces that drag semiperipheral zones to different directions are confirmed: on one hand, dynamics of peripherality that subordinate such zones to the needs of the core States; and, on the other hand, the state efforts to keep itself at an intermediate point of the hierarchic continuum and – eventually – be able to contest a place in the core-areas of the system. The structural positions in the world-system are evidently transitory and temporary, and though significant promotion/relegation changes might happen, they are only observed in the *moyenne durée* and *longue durée* periods.

The semiperiphery, most dynamic zone of transit, interconnection and fluxes, finds itself determined and influenced by core processes in the same way that it finds itself affected and intervened by peripheral processes; this is the reason why some semiperipheral states – and just a few of them – can be boosted towards the core, or as well restrained and dragged towards periphery. As pointed by Peter Taylor and Colin Flint, “the opportunities for change are produced during periods of recession, but they are very limited, once the whole semiperiphery cannot be converted into a core zone” (Taylor and Flint 2002, 22). And it is during the turning points of the Kondratieff Cycles that such periods of recession and possible structural change are more clearly posed (Kondratieff 1946).

2. Semiperipheral nature of Brazil, Russia, India and China (BRIC)

Parallel to the evolution of the world-system theory there has been a spurt to empirically differentiate and identify zones and countries of the core-semiperiphery-periphery countries. Among such essays, it is necessary to highlight the works of: David Snyder and Edward Kick as the first effort to bring an empirical support – based on the commercial fluxes, the military interventions, the diplomatic interchanges and the membership in international treaties – for the structural positions theoretically proposed (Snyder and Kick 1979); of Roger Nemeth and David Smith who, in opposition to the orthodox tripartite division, propose four different structural positions – core, strong semiperiphery, weak semiperiphery and periphery – in the world-economy (Nemeth and Smith 1985); of Edward Kick and Byron Davis who, besides the core-periphery categorization, also dissert on a high semiperiphery – what they called a semicore – and a low semiperiphery (Kick and Davis 2001); and, more

recently, of Matthew Mahutga and David Smith who suggest other categories, like: core, core competitors, high-level semiperiphery, strong periphery, weak periphery and weakest periphery (Mahutga and Smith 2011).

As observed, it is the “intermediate” part of the world-system the one which raises more problems and difficulties at the time of empirical identification. Moreover, once the 20th Century was the period when the group of States typically identified as semiperipheral “has experienced social and economic transformations of long range, often associated to political convulsions” (Arrighi and Drangel 1986, 10), it is more complicated to precise exactly until what extent they have surpassed, maintained or diminished their intermediate status.

In spite of this complication, there is a broad consensus in the academy about the semiperipheral situation of countries like: Saudi Arabia, Argentina, Brazil, China, India, Mexico, Russia, South Africa and Turkey, that is to say, States that have also been labeled as regional powers (Rocha Valencia and Morales Ruvalcaba 2011).

Regarding the group of semiperipheral countries and regional powers, the so-called BRIC members are the ones which have developed the most fastened and profound processes of structural ascension in the past two decades. That understood, and bearing in mind the theoretical cuts aforementioned, the paper will advance in the study of the semiperipheral nature of each one of these countries.

2.1. Brazil

Brazil can be labeled as a semiperipheral nation state and a regional power *par excellence*. André Gunder Frank already wrote in the 1970s: “Brazil has been by far the most spectacular and widely considered intermediate, semiperipheral and ‘associated’ or ‘sub-imperialist’ development in the Third World since the contemporaneous world crisis” (Gunder Frank 1979, 290).

Brazil finds itself experiencing profound core and peripheral dynamics at the same time because, on one hand, it has been historically linked to the great European centers of political and economic power thanks to its huge endowment of natural resources and area; but, simultaneously, it lies geographically in the periphery of the world-economy. Therefore, Brazil is one of the most representative cases of semiperiphery.

In the words of Maurício Domingues,

“(…) out of the Latin American countries, Brazil was the one that has gone further in its industrialization process. Since the beginnings of the 20th Century, a lightweight industry has developed surrounding the most dynamic commodity (mainly coffee) exporter centers, a second sector economy was established and, with the Vargas-U.S. agreement, it managed to import and little by little to dominate the steel technology already in the 1930s. Along with India, it was the sole country to develop a tool machine sector, that is to say, machines that produce machines, even if at a low sophistication level. Brazil, despite its high internal inequality, at some point seemed to get close to the control of basic technology of the second phase of modernity and its second industrial revolution.” (Domingues 2012, 28-29)

This is stated from the economic and industrial points of view. Nonetheless, the promulgation of the 1988 Constitution meant an emblematic moment for Brazil – at its transit process to democratization and consolidation of governmental institutions – from the political point of view. The new constitutional order was instituted thanks to a strong national frustration emerged from the differences between the project of government articulated by the military dictatorship (1964-1985) and the aspirations of society, in such manner that the 1988 Constitution acquired fundamental importance in the reshaping of the relations between state, market and civil society.

The year of 1987 was marked by the rollout of the Constituent Assembly. The Assembly presented, *grosso modo*, a conservative profile in moral questions and a progressive one in economic questions (it is worth mentioning that, though a minority, the progressive parties were able to approve many of their demands thanks to the support of social movements, universities, professional associations and trade unions). The conclusive result was, on the one hand, a constitution that embodied the human and social rights’ guarantees along with the formal sociopolitical equality; and, on the other hand, a demonstration of institutional maturity of the country in a redemocratization moment and a historical experience that represented a milestone in the Brazilian political history⁷.

⁷ Besides that, the 1988 Constitution aimed to surpass the pendulum movement between centralism and federalism, which finally transformed the municipalities in autonomous federative entities, but only in

Ever since Brazil has been able to internationally project attributes like political values, an active foreign policy and its cultural allures. As part of the geoculture of the South American giant, it is also possible to mention “the joy of Brazilian carnival and also of its favorite sport, football, is a milieu and a message of government and companies in their conviction strategy” (Branco Luiz and Heleno 2011, 43).

Despite these achievements, Brazil internally faces difficult socioeconomic challenges that need to be dealt with in order to improve its structural position in the International System. Differently from China, India and even South Africa, which have vigorously grown in the past few years, the Brazilian development has been intermittent, so that its economic performance has been more characterized by the discontinuous growth of its GDP and of its commercial exchange between the country and the rest of the world.

Besides, Brazil still suffers – since many decades ago – of large corruption, inequality, socioeconomic exclusion, deforestation, racism, violence and insecurity. Nowadays, Brazil retains the position of one of the most unequal countries of the world and a rough third part of its population lives in poverty. However, in the search for a solution to all these problems and the consequent Brazilian international prominence, two different streams of thinking and social forces have been confronting each other, according to Samuel Pinheiro Guimarães: one, represented by Barão do Rio Branco, Getúlio Vargas, Juscelino Kubitschek, Celso Furtado, Ernesto Geisel, Lula da Silva, Celso Amorim

“and the patriots who understood the need to promote the country’s industry, to build, expand and integrate its internal market, to develop the technological capacity, to diversify its foreign affairs and to reduce its vulnerability and

regard to subjects of local interest. Since 1988, the Brazilian state has been built over: a presidential system whose titular enjoys important faculties, a bicameral legislative system with symmetrical powers (the deputies are elected through proportional representation system, while the senators through the majority rule), a robust federation (whose levels – Union, States and Municipalities – enjoy significant autonomy) and a detailed and modern constitution with clear procedures for amendments. This political system tends, on one side, to disperse considerably the institutional power between many political powers; but, on the other side, it also tends to concentrate the political power in the ends of the Head of the Executive and to strength the presidential character of the state.

dependence in relation to the so-called great powers, ex-colonial metropolis or neocolonial metropolis.” (Pinheiro Guimarães 2004, 15)

And the other stream – with exponents like Visconde de Mauá, Gaspar Dutra, Collor de Mello and Fernando Henrique Cardoso –, which advocates that

“the Brazilian insertion should be made through its comparative advantages in terms of: soil and climate; privileges to foreign capital, companies and technology; overestimation of the monetary stability and free exchange, from the point of view that Brazil must accept a secondary and respectful role in relation to the great powers, an unarmed and discrete country, conscious of its power scarcity and cultural inferiority.” (Pinheiro Guimarães 2004, 15)

These streams of thought have had a strong influence respect to the internal development and to the formulation of strategies in Brazil’s foreign policy, prevailing the nationalist and developmentalist stream in the last decade. Therefore, Brazil has been playing a relatively more autonomous mediation role⁸ recently thanks to its sub-regional strategy of integration and consolidation: first, creating a strategic alliance with Argentina through the signature of the Integration, Cooperation and Development Treaty; second, promoting the constitution of Mercosur; third, supporting the formation of a South America Free Trade Area; and, finally, working for the creation of the Union of South American Nations. The efforts made by this foreign policy have been oriented towards the improvement of its bargaining power as a regional spokesman, the international recognition of its regional power status and a subtle shift of the balance of power to Latin America.

⁸ One of the examples of mediation can be found at the “role played by Brazil’s foreign policy in the creation of the ‘Group of Friends of Venezuela’ and the disarticulation of the coup process started to oust the president Hugo Chávez in the beginning of 2003” (Fernandes 2004, 7), which mitigated the risk of a civil war and helped the fulfillment of a popular referendum for the *Chavista* regime. A more recent example is observed when Brazil – along with a group of semiperipheral nation states – form a multilateral stabilization force (named MINUSTAH) through UNSC Resolution 1542. Before this unprecedented composition of mediation states, Ricardo Steinfus has considered a historical feat to be able to find ourselves in the beginning of a new stage of mediation and, in case of the solidary Brazilian diplomacy “getting to reap rewards in Haiti, a new mediation and intervention model will emerge. It will be an *austral* option capable of creating a new alternative to conflicts involving states in the path of development” (Steinfus 2007, 14).

In order to Brazil to continue a structural ascension process in world-system, it is imperative that this South American colossus is capable to deploy and to defend global interest, as well as to assume diversified agendas and positions, without bending to a sole partner.

2.2. Russia

Russia has been historically considered a semiperipheral state. Inclusive, Immanuel Wallerstein – in the first volume of its “The Modern World-System” – wrote: “when Russia is absorbed in the future by the world-economy, it enters as a semiperipheral state (like the 1600s-1700s Spain) and not as a peripheral one” (Wallerstein 2003a, 445).

It was perhaps during the existence of the Soviet Union (1922-1991) that an important national industry, a commercial link to the world, the diffusion of an alternative way to capitalism were developed, thus approaching it to the center of the world-system. Nonetheless, problems like the increase of public deficits, the lack of competitiveness of the national economic structures, the coercion of masses, the suppression of certain political rights, the generalized corruption, insecurity, difficulties to “assimilate informationalism” (Castells 2005c, 407) and, finally, the economic dependence on natural resources like gas and petroleum stopped Soviet Union from the consolidation at the core of the world-system. In respect to this process, Christopher Chase-Dunn is right to note that the formation of semiperipheral states “has frequently been recognized as a phenomenon related to the rise and the fall of empires and the shift of hegemony within interstate systems” (Chase-Dunn 1988, 36). According to Carlos Aguirre, the USSR only managed briefly “to improve its position within the world-system, increasing its international presence and its own relative autonomy, and provisionally creating an independent space for development” (Aguirre Rojas 2003, 59), but never managed to present itself as a serious contender before the U.S. for the global hegemony.

The disintegration of the Soviet Union in 1991 led to the foundation of the Russian Federation, a state that remained economically, politically and militarily reduced since its origins, and that stood in structural decline towards periphery until the end of the 1990s. With the advent of Vladimir Putin in the presidency in 2000, Russia entered a process of political restructuring – named “vertical of power” – that helped the state to conquer a leading role at the

conduction and dynamics of the national economy. Since then, and until the 2008 Crisis, the Russian economy has steadily grown at average rates of 6.95% and 7.31% in terms of its GDP and GDP per capita, respectively.

The Russian economic dynamism has helped: the promotion of a progressive presence of Russia in its neighbors and Europe, especially in the energetic field; the geocultural propagation, through the promotion of language and the penetration of Russian media; and, finally, the political leadership and the creation of regional institutions, like the Shanghai Cooperation Organization (in 2001) in dialogue with China; the Common Economic Space (in 2003) with Belarus, Kazakhstan and Ukraine; and the Collective Security Organization Treaty (also in 2003) with Belarus, Kazakhstan, Kyrgyzstan, Tajikistan and Armenia.

2.3. India

After 9/11, no region of the world has gained as much importance as South Asia⁹. For India, this new international context – added to domestic changes like the military growth and the transformations related to the political culture – permitted it to “give shape to a series of triangular strategic relations involving a myriad of both traditional and non-traditional powers” (Kapur 2006, 203), projecting itself as one of the biggest pan-Asian powers of recent years.

However, and not so long ago, India was part of the periphery of the world-system. Since the 16th Century, Portuguese, Dutch, French and finally British submitted India to processes of peripheralization. It wasn't until the 1990s that

“India opened up to foreign countries, allowing a freer installation of companies, whilst the financial sector continued, since the 1980s nationalization, in the hands of the state. The country, primarily counting on its Science & Technology resources, bet on microelectronics, which did not work well, and informatics, which ended up becoming a national pride as the area through which the country's ascension to an

⁹ Or Southern Asia. Though it has never been a coherent geopolitical region, from the geographical point of view it consists on the sum of the Iranian Plateau and the Indian Subcontinent. It encompasses Afghanistan, Bangladesh, Bhutan, India, Iran, Maldives, Nepal, Pakistan and Sri Lanka.

emergent position was substantiated, besides high growth rates that covered all the economy. In fact, India was able to attain a global semiperipheral position thanks to the project and modernizing turn launched by Nehru, with important industrial sectors (automobile, pharmaceuticals, steel), and was also able to penetrate the software industry like few other countries in the world.” (Domingues 2012, 41)

At present, India is enrolled in the *monster country* category (Kennan 1994, 143) or as “elephant country” (Fossaert 1994, 336-341) because of its territorial extension and population, and projected as one of the main economic powers for the 21st Century thanks to the vertical development showed in the last decades. Nonetheless, India’s growth is not exclusively limited to the economic-commercial scope, but also exceeds it to political and cultural aspects. According to André Gunder Frank, India “perhaps has the most sophisticated and independent bourgeoisie of the Third World” (Gunder Frank 1979, 312).

With its more than 1.2 billion inhabitants and consisting of a parliamentary democracy, India has been characterized as the largest democracy of the world. This image, coupled with its ancestral culture, has contributed for India to exercise a significant influence in Asia and the rest of the world. In the terms of Shashi Tharoor, ex-Under-Secretary General of the United Nations and member of the Indian Parliament,

“India’s is a civilization that, over millennia, has offered refuge and, more importantly, religious and cultural freedom, to Jews, Parsis, several varieties of Christians, and Muslims. [...] Indian mind has been shaped by remarkably diverse forces: ancient Hindu tradition, myth and scripture; the impact of Islam and Christianity; and two centuries of British colonial rule. The result is unique. Though there are some who think and speak of India as a Hindu country, Indian civilization today is an evolved hybrid. We cannot speak of Indian culture today without qawwali, the poetry of Ghalib, or for that matter the game of cricket, our de facto national sport. When an Indian dons ‘national dress’ for a formal event, he wears a variant of the sherwani, which did not exist before the Muslim invasions of India. When Indian Hindus voted recently in the cynical and contrived competition to select the ‘new seven wonders’ of the modern world, they voted for the Taj Mahal constructed by a Mughal king, not for Angkor Wat, the most magnificent architectural product of their religion. In the breadth (and not just the depth) of its cultural heritage lies some of India’s soft power.” (Tharoor 2009)

India's geoculture continues to expand itself widely and profoundly, especially in the direction of South and Southeast Asia, thanks to its huge diaspora, to the fact that it does not have any border disputes with them and, above all, to its very appreciated cultural products and values (music, cinema, television series, yoga, technology, gastronomy, etc.).

However, in spite of the increasing weight of India in the world-system, its situation remains semiperipheral. Inside the country, discrimination, violations to human rights by the hands of the state (specifically, by the police and the army), impunity, use of torture, death penalty, poverty, social inequality, lack of infrastructure, generalized corruption and ethnical disputes prevail – all of them problems that will hardly be solved in the short and/or medium term. Hence, it results hazardous “to think that India will be capable to surpass its clearly semiperipheral position in the next years” (Domingues 2012, 41).

2.4. China

The real and latent possibility of that some semiperipheral states could position themselves in the core of the world-system and eventually dispute the U.S. hegemony in the 21st Century has created much interest and speculation, being China the center of all of these discussions. However, from the *longue durée* perspective, it can be assumed that China does not emerge to occupy an outstanding post in the world-system, but “re-emerges” and win back a post that was of its centuries ago.

Janet Abu-Lughod – who rebuilds the shape of the world-system in the 13th Century – sustains that such period was known for the important economic developments of China:

“the breakup of estates, the rise of capitalistic-cure-state commerce, significant technological and social inventions that mark the beginning of a new industrial phase with highly developed metallurgy, and a new phase of long distance trade complete with banking, instruments of credit, and even paper money.” (Abu-Lughod 1987-1988, 16)

The socio-economic, political and military development of China during this period was outstanding and more advanced than in Europe.

However, Chinese defeats at the Opium Wars (between 1839-1842 and 1856-1860) and at the First Sino-Japanese War (1894-1895), the end of the Qing Dynasty – with the abdication of the Emperor Xuantong in 1912 –, the posterior attempt to form the unfruitful Republic of China (1912-1949) and, finally, the beginning of the Civil War in 1927 and its prolonging until 1950 made China to fall from the core to the semiperiphery and, later, to the periphery of the world-system. It was thanks to its millenary culture, tough nationalism and inextinguishable vocation to be a great power that China could keep itself cohesive and was able to survive to the most ruthless peripheralizing forces. In this sense, Christopher Chase-Dunn argues that

“China was never completely peripheralized, though areas within China were. The civilizational strength of China enabled her to resist colonization by the West and to rebuild political unity and military strength within the Europe-centered interstate system. China was also one of the most commercialized of the world-empires prior to its incorporation into the capitalist world-economy.” (Chase-Dunn 1990, 27)

Since the arrival of Deng Xiaoping to power and the launch of economic reforms in the end of the 1970s, China has managed to grow constantly between 1978-2011 in an average rate of 9.97% of its GDP and of 8.84% of its GDP per capita, becoming the nation a development paradigm. China has also created a whole independent model of development that has been named Beijing Consensus, which – opposite to the neoliberal program proposed by the Washington Consensus – is featured, according to Joshua Cooper Ramo, by

“It is defined by a ruthless willingness to innovate and experiment, by a lively defense of national borders and interests, and by the increasingly thoughtful accumulation of tools of asymmetric power projection. It is pragmatic and ideological at the same time, a reflection of an ancient Chinese philosophical outlook that makes little distinction between theory and practice.” (Cooper Ramo 2004, 4)

Along with the economic growth and the aforementioned development mode, the Chinese geocultural influence has also increased significantly. In 2005, Joseph Nye has already wrote:

“China has always had an attractive traditional culture, but now it is entering the realm of global popular culture as well. Chinese novelist Gao Xingjian won China's first Nobel Prize for Literature in 2000, and the Chinese film "Crouching Tiger, Hidden Dragon" became the highest grossing non-English film. Yao Ming, the Chinese star of the U.S. National Basketball Association's Houston Rockets, is rapidly becoming a household name, and China is set to host the 2008 Summer Olympics. The enrollment of foreign students in China has tripled to 110,000 from 36,000 over the past decade, and the number of foreign tourists has also increased dramatically to 17 million last year. China has created 26 Confucius Institutes around the world to teach its language and culture, and while the Voice of America was cutting its Chinese broadcasts to 14 from 19 hours a day, China Radio International was increasing its broadcasts in English to 24 hours a day.” (Nye 2005)

However, despite seen itself at present as one of the main contenders for the global hegemony, China is in fact many countries: one developed and cosmopolitan, which is concentrated near the Chinese coast, with provinces like Shandong, Jiangsu, Zhejiang and Guandong, or municipalities like Shanghai, Beijing and Tianjin; and another one marginalized and impoverished, located inland, with provinces like Guizhou, Gansu, Yunnan or the autonomous region of Tibet. Ben Derudder finds out that in China

“the three zone-articulations of the inherent spatial inequality within world-economy seem to be represented: an affluent region next to Hong Kong (which could be considered a core-area), regions ‘in development’ next to Beijing and Shanghai (which could be considered semiperipheral) and ‘underdeveloped’ regions in central and western regions of the country (which could be considered peripheral).” (Derudder 2003, 92)

Besides the enormous social inequality within the country, the Chinese development has been permeated by brutal political repression, illicit enrichment of all ranks of the Communist Party, social polarization and environment destruction, not mentioning other aspects. Therefore, it still remains arguable to what extent China has only managed to achieve “the most developed stages of semiperiphery” (Domingues 2012, 39) or has truly approached the core of the world-system.

Conclusions

It might seem that the so-called globalization has pushed humanity into a crisis situation. However, as pointed out by Elmar Altvater and Birgit Manhkopf, only “equipped with the World-System Theory’s scale it is easier to understand the trends of globalization when the world-system’s history is studied, once the globalization is inserted into it” (Altvater and Mahnkopf 2002, 14). If the globalization is observed as a dynamics of the world-system, it will be noted that it is certainly not a recent phenomenon, nor of *courte durée*, but a result of processes of *moyenne* and *longue durée*; however – and at the same time – it produces new transformations. Thus, it is the modern world-system what finds itself in a historical moment of crisis and change stimulated certainly by globalization.

With the economic-financial crisis of 2008-09, the global geoeconomic order, which was until then commanded by the Group of Seven (Canada, France, Germany, Italy, Japan, United Kingdom and the U.S.), has started to change substantially. The crisis put in evidence the limitations of the antique club of “largest industrialized economies of the world” in respect to solve energetic, environmental, food and, above all, financial problems. The G7 – that because of strategic reasons has already invited Russia in 2002 – considered, since the Gleneagles Summit in 2005, to invite five remarkable semiperipheral countries: Brazil, China, India, Mexico and South Africa. The G8+5 finally resulted in the Group of 20, mechanism of global governance that has been holding meetings since 2008.

Nonetheless, further on a merge of politics and willpower, what prevailed in G20 was the existence of two different blocs: on one side, G7 and other contributing intermediate powers (Rocha Valencia and Morales Ruvalcaba 2008), “advocates of the neoliberal Washington consensus [that] emphasize that it is government interventions that are the source of the problem” (Stiglitz 2011, 16); and, on the other side, the so-called BRIC that – under the label of emergent and in-development economies – have insisted on the necessity of reform the liberal institutions emerged in Bretton Woods “so that they are able to reflect more properly the changes of economic weight in world-economy with the objective of incrementing their legitimacy and effectiveness” (G20 2008, 3).

In the past few years, the BRICS (with the embodiment of South Africa) has institutionalized itself as an international forum that holds presidential summits and ministerial meetings periodically. Within this space, its members are advancing in many ways towards the construction of a more equal and multipolar order, apart from the authority of G7: in December, 2010, they managed to complete the demanded reforms concerning quotas and government structures of the International Monetary Fund, such that “the 10 largest members of the Fund would consist of the United States, Japan, the BRIC countries, and the four largest European countries (France, Germany, Italy, and the United Kingdom)” (Fondo Monetario Internacional 2011, 39); in 2011, they actively participated of the UN Security Council as a permanent member (China and Russia) or as a non-permanent member (Brazil between 2010-11 and India and South Africa between 2011-12); in 2012, they considered “the possibility of creating a new Bank of Development” (BRICS 2012, point 13), financial organism supplementary to the financial institutions directed by G7. Finally, in 2012-13, they modified their contributions to the UN Fund: China increased its quota in 61%, becoming the sixth largest contributor, going from 3.2% to 5.1% of the complete amount; Brazil was the member that, in terms of percentage, assumed the largest compromise, raising its quota in 82%, which represented a change from 1.6% to 2.9% of the fund; and India also increased its contributions, though only in 24%, which represents a modest increase from 0.5% to 0.66% of the global quota.

Perhaps with the exception of China – which has recently achieved extraordinary remarkable levels of structural positioning – the nature of BRICS remains semiperipheral. Despite its limits the BRICS Forum opens a dynamic window in many senses: it can be that at the margin other associations, groups or agreements are consolidated, or that BRICS itself expands and encompasses other regional powers that might compete at a global level, or else jointly form a counterweight to the present blocs and global powers, like the European Union and even to the United States.

The 21st Century will definitely remain a changeable scenario and one can expect that the deepest transformations come from the semiperiphery.

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ABSTRACT

The objective of this investigation is to carry out a broad revision and reconstruction of the concept of semiperiphery, in which the original ideas of Immanuel Wallerstein can be articulated with the developments made by other contemporaneous world-systems theorists. Once this goal is accomplished, the study of the semiperipheral nature – both internal and systemic – of the so-called “BRIC” countries (Brazil, Russia, India and China) in the international context of Post-Cold War.

KEYWORDS

BRIC; Semiperiphery; Neomarxism.

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