

## Margaret Somers in Conversation with Daniel Hirschman

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### Abstract

Margaret R. Somers is a leading comparative historical sociologist and social theorist specializing in law and political economy, citizenship and rights, and the work of Karl Polanyi. After pathbreaking work early in her career on the origins of modern citizenship rights as well as on the logic and practice of comparative historical sociology, historical epistemology, and narrative analysis she turned to problems of escalating social exclusion, statelessness, and the threat to citizenship rights in the context of intensifying neoliberalism. Author of multiple articles and books and winner of numerous prizes, Somers is Professor Emerita of Sociology and History at the University of Michigan. Strongly influenced by the writing of Karl Polanyi, she has been a key contributor to debates on English legal history; dedemocratization and the rise of neoliberal authoritarianism; the political economy of predistribution, moral worth and market justice, and the political power of knowledge cultures and ideas. She also writes about contemporary social policy for a broader public in *The Guardian*, the *Washington Post*, *Open Democracy*, and other venues.

In this interview with Daniel Hirschman, conducted between 2021–2022 in a multiplicity of synchronous and asynchronous formats befitting the pandemic moment, Somers discusses her intellectual and political trajectories and how they shaped her intersecting research programs, including her latest work on moral economy, predistribution, and the contemporary authoritarian moment.

**Keywords:** Karl Polanyi; law and political economy; capitalism; comparative historical sociology; citizenship rights; moral economy.

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## 1 Becoming a Sociologist

**Daniel Hirschman:** How did you get interested in sociology? How did you end up studying it in graduate school? What connection, if any, did it have to the political movements of the time (my hunch, from knowing you a bit! is that your political and academic commitments have always informed each other, but I'd love to hear more about it!).

**Margaret Somers:** I was born a natural sociologist thanks to my Quaker upbringing, the result of the union between my Southern high Episcopalian mother and my Jewish immigrant father. More of a culture than a religion, Quakerism nurtures dissenters, social justice advocates, and anti-authoritarians. By the time I was 15 I was already protesting the Vietnam War, and my first year of college I participated in the famous March Against the Pentagon. Then, in 1968 the world turned upside down. MLK was assassinated; so was RFK. In horror I watched the Chicago Democratic Convention and, with the “whole world watching,” the police bludgeoned anti-war protestors in Grant Park.

It was a bleak moment—time to get serious about the revolution. I left Vassar College and transferred to Merrill College, the “College of Social Change in the Third World,” at the University of California, Santa Cruz, and became a Sociology major. Fortuitously, my undergraduate advisor was Wally Goldfrank, a student of Immanuel Wallerstein and Terrence Hopkins at Columbia, and thus by extension, of Karl Polanyi. What a lucky inheritance I had stumbled into!

I became an avid New Left feminist, and in 1969 organized “Bread and Roses”—the first feminist conference in California; started a daycare center for welfare mothers; worked with Cesar Chavez’s Farmworkers’ Union; with the Black Panthers in the “Breakfast for Children Program;” and built an anti-war Café for young people in Santa Cruz. All the while, I protested the war in Vietnam.

Rage and frustration set the stage for a fateful decision I made in college at age 19. The Vietnam war accelerated with Nixon’s invasion of Cambodia, which led to the murders by the National Guard at Kent State in May 1970. The idea circulated that the student anti-war movement was pointless; only organizing the proletariat into a general strike would sufficiently pressure the government to change policy. Convinced, I was recruited into a Maoist Marxist-Leninist political organization called the Revolutionary Union (R.U.), a break-off from the defunct Students for a Democratic Society, which required me to admire Stalin and target practice under the Monterrey Freeway in preparation for the revolutionary “armed struggle.” I can’t overstate how that brush with delusion produced in me an aversion to orthodoxies of all kinds and set me on a path towards an affinity with Polanyi and other left intellectuals (such as E.P. Thompson and Hannah Arendt) whose life work embodied principled stands on the left against dogmatism.

After graduating, I became a teaching assistant at UC Berkeley for the wonderful young sociologist, Arlie Hochschild. I joined the editorial board of the new journal, *Socialist Revolution* (S.R.), which despite the overblown title was a journal of political economy and history founded by the late James Weinstein, John Judis, Eli Zaretsky, and others. S.R. articulated a democratic socialist-feminist politics, and for the first time I realized that I could not only make politics but also make and think ideas.

I then participated in establishing the New American Movement, the democratic socialist successor to SDS, and with Katherine Johnson wrote what became the founding document of the new organization. “Behind every Sexist stands the Boss: A Socialist Feminist Manifesto”

(Johnson & Somers, 1972)<sup>1</sup> argued that the site of *reproduction* was equally essential to capitalism as that of paid labor, and it needed to be recognized for its economic value to give meaning to the slogan that the “personal is the political.” We made clear that the subordination of women is a thoroughly political phenomenon—not a “natural” one—that must be challenged through politics.<sup>2</sup> This early critique of “social naturalism” became an intellectual theme of my life’s work.

When I moved to the Boston area I joined with Silvia Federici and Selma James in the “Wages for Housework” movement.<sup>3</sup> At the time, we were vilified by other feminists who believed the movement would keep women at home and disempowered. Our theory posited exactly the opposite: Wages for Housework stipulated that because women *already* generate economic value from reproductive housework, it was imperative to recognize and remunerate the worth of this work to the macroeconomy, as acknowledging women’s full economic value was the *precondition* for our empowerment. It is hard to believe just how controversial this movement was in the early 1970s, as its claims have been demonstrated so consistently by mainstream economics.<sup>4</sup>

## 2 Graduate School

**DH:** So, now in Boston and thoroughly ensconced in the social movement scene, you then entered graduate school. What was that like? What were some formative experiences then? Who were your most important mentors? Interlocutors?

**MS:** Let me set the scene for you of grad school and left academia in the mid to late 1970s. As the truth about the Chinese cultural revolution was slowly coming to light and the Soviet Union was revealing its increasingly post-1968 (invasion of Czechoslovakia) tyranny, the atmosphere was filled with an exhilarating antipathy for “vulgar Marxism” in favor of a more critical and culturally inflected post-Marxism, one implicitly sensitive to feminism and race (although insufficiently) and especially to the state. The anti-Stalinist Marxists became heroes—the “early Marx” himself; Lukács (despite his dark side); The Frankfurt School—Horkheimer, Adorno, Marcuse, and, with mixed feelings, Habermas; and especially the “British Marxist historians”—E.P. Thompson, Hobsbawm, Hill, Hilton, Raymond Williams—and their fellow travelers, Ralph Miliband and Doris Lessing.

In graduate school at Harvard, I immersed myself in political sociology, social theory, and history, with Theda Skocpol and Daniel Bell my primary mentors, as well as John Brewer (English history), Peter Hall (political science,) Sally Falk Moore (legal anthropology). Skocpol was *the* rising star of the discipline and I owe much of my early career to our collaboration in

1. In preparing for this interview I only now discovered that our 1972 Manifesto is discussed by American historian, Sara M. Evans, *Tidal Wave: How Women Changed America at Century’s End* (2003, p. 161), and discussed in depth in a recent Syracuse Masters’ Thesis, Chris DiCesare’s (2019) “A growing excitement that ‘something was happening’: A Rhetorical History of Gay Liberation and Socialist Feminism in the New American Movement between 1970 and 1980.”

2. And while we didn’t specifically address sexuality in that paper, later work on sexual politics and gay liberation perceived it as opening the potential for sexuality to be considered both within the sphere of production and the sphere of reproduction (DiCesare 2019, p. 79).

3. See Federici & Austin (2017) and Federici (2020).

4. Indeed, Silvia Federici was written about at length in the *New York Times Sunday Magazine* just a few months ago: <https://www.nytimes.com/2021/02/17/magazine/waged-housework.html?searchResultPosition=1>

what became a flagship article in the new subfield of comparative historical sociology (Skocpol & Somers, 1980), which first conceptualized three different methods of historical comparison. I studied social theory with Bell, who became my dissertation advisor when Theda was fired (temporarily) from Harvard. It was an odd match: I was a flaming New Leftist and Bell a well-known neoconservative. In truth, Bell was never as conservative as his peers such as Irving Kristol, and while he worried about detecting a Bolshevik hiding inside every student's backpack, his background as a Trotskyist arguing politics in the alcoves of CCNY in the 1920s and 30s was irresistible. To everyone's surprise, Bell was my biggest cheerleader.

**DH:** What was the intellectual space like at the time? What were the big questions that shaped your approach to sociology and history?

**MS:** I spent most of my graduate career at Harvard's Center for European Studies, where I happily shared an office with my fellow graduate student David Stark. The atmosphere was dominated by three formative debates.

*"Bringing the state back in":* The first was over the "role of the state," a question that surfaced in the 1970s with the anti-economistic tide in political science and sociology and a renewed interest in Weber, and made most famous by Skocpol (Evans et. al., 1985) herself. The main antagonists originally were both Marxists—Ralph Miliband versus Nicos Poulantzas, an Althusserian structuralist, who accused Miliband (1969) of "instrumentalism" (aka vulgar Marxism) for his linking the capitalist class directly to the structures and functions of government. But it quickly evolved into a much wider debate over the state's "relative autonomy" from capitalism, and reflected the anxiety of progressive academics not to be too closely associated with that dreaded "vulgar Marxism."

*Feudalism to capitalism:* Then there was the question of the "transition from feudalism to capitalism." Although the terms of debate were set by an earlier generation—Maurice Dobb (production) versus Paul Sweezy (circulation)—the entire discussion was transformed by the appearance of three new critical texts, Perry Anderson (1974), who centered his analysis on the "absolutist state," Immanuel Wallerstein (1975), who introduced "World-systems theory" into the social sciences, and Robert Brenner (1976), who brought attention back to the centrality of class. This debate became central to my dissertation research on the origins of English citizenship rights and working-class formation.

*Structure versus agency:* The third debate was between E.P. Thompson and Althusser, in which Thompson (1978) accused Althusser of a theoreticist structuralist dogmatism. When I started grad school Thompson's *Making of the English Working Class* (1965) was the bible of young New Left academics captivated by his focus on the power of human agency. He famously argued that the English working class "made itself" and was not a mere pawn of history. Thompson was more than a historian; he was a political activist, anti-nuclear activist, and most importantly, seen as the moral leader among the group of British historians (including Christopher Hill and Rodney Hilton, founders of the journal *Past & Present*) who resigned from the British Communist Party in 1956 to protest Stalin's suppression of the Hungarian revolution. Braiding together this moral stance with his culturally-oriented history inspired extraordinary devotion. Arguably, without Thompson, there never would have developed the next fixation of my generation, the "structure-agency" problematic (most associated with Anthony Giddens), which aimed to capture Marx's famous edict that (to paraphrase) "Men [sic] make history, but not under conditions they choose."

**DH:** Your approach to these three debates was shaped by your engagement with another

Karl, not yet named: Karl Polanyi. Tell us a bit about that. How did you first encounter Polanyi? What drew you to his work?

**MS:** I first engaged *The Great Transformation* (1944) (hereafter GT) in depth in the German historian Mary Nolan's graduate seminar. Polanyi's depictions of the cultural devastation inflicted by industrialization, commodification, and the New Poor Law on English working-class communities transfixed me. It seemed he had an almost spiritual connection to the soul of English working people and his descriptions of humans being tossed about and treated as disposable "fictitious commodities" were astonishingly evocative. From Polanyi, I learned that when writing about the depredations of market society such rhetorical affect was (and is) not only justified but *required*.

My new interest in Polanyi came to a lucky head when Theda invited Fred Block and me to write a chapter on his work for *Vision and Method in Historical Sociology*, the book that kickstarted the subfield of comparative historical sociology, which became Block & Somers (1984, 2014).<sup>5</sup> It's hard to remember just how few people knew of Polanyi in the late 1970s. We argued that his relatively neglected status among canonical theorists was explained by his theoretical liminality—he fell between the cracks of the dominant schools of Marxism and economic liberalism. Our title, "Beyond the Economistic Fallacy...", taken from Polanyi's (1977) own words, captured his rejection of their mutual overemphasis on "economistic" interests. Economic institutionalism—a focus on rules, policies, practices, and power, rather than naturalized systems—was/is the Polanyian antidote to the economistic fallacy.

**DH:** I'm sure you'll have more to say about Polanyi. But is there anything else you want to add about your time in graduate school, and your reflections on it from the present moment?

**MS:** Let me end with a paradox. Alas, escaping the economist fallacy was an aspiration deeply out of place with its time. I began grad school in the mid-1970s amidst an optimistic post-Marxism. But as we rejected the Soviets, embraced Eurocommunism and the "relative autonomy" of the state, and increasingly centered culture and institutions, by the 1980s the Thatcher and Reagan revolutions were turning the world into a Marxist caricature of the economistic fallacy: While we valorized "new social movements" and cultural discourses, the state *really* was becoming the "executive committee of the ruling class" and unions *really* were being decimated. Like ships passing in the night, throughout the 1970s and 80s neoliberalism was turning the *real* economy into a market fundamentalist nightmare, while many academics obsessed only on culture. It's not that this was wrong: Culture, power, and discourse *were* essential weapons in the war on social equality, racial justice, and gender equity. The mistake was that progressive academics too often framed them as alternative and superior perspectives to that of political economy, rather than as the modalities through which the neoliberal backlash was channeled. My generation came of age in liberal post-war America. It's hard to convey the shock of Reagan's election to the presidency, a shock we tempered by deluding ourselves that it was an aberration from what we had learned was the inextricable normative coupling of "democratic capitalism." How wrong we were.

### 3 Dissertation

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5. The chapter was translated into Chinese shortly after its publication to become the Introduction for the first Chinese version of *The Great Transformation*.



**DH:** Having set the intellectual and theoretical scene, tell us a bit more about your empirical work. How did you come to write a dissertation about English working-class formation?

**MS:** A combination of Marx's Chapter X of *Capital*, "The Working Day," E.P. Thompson's *The Making of the English Working Class*, and Polanyi's *The Great Transformation* catalyzed my love affair with English working-class history. But it was a love affair animated by the *history of the present*. That present, of course, was Reagan's sudden and brazen attack in the 1980s on the social state. Chapter X of *Capital* is Marx's analysis of how in the heyday of laissez-faire the government passed the Ten Hours' Act in 1847, limiting the hours of women and children's factory labor. How had such a powerful constraint on the power of property succeeded? Marx's answer didn't satisfy me, as it focused exclusively on elite interests. I was interested in the workers' Factory Movement: Why did they articulate their demand for limited hours in the language of legal rights? Why did they target the law's obligation to protect their rights and *expect* their rights to be honored? Why did working people fight economic tyranny in language of obligation between what I came to call "the people and the law"?

It was reading Polanyi that convinced me that to answer these questions I needed to investigate the *institutional roots* of the solutions they articulated. That led me to the new research in "protoindustry." Pioneered by German economic anthropologists (Kriedtke et al., 1977), this research broke pre-industrial European national economies into regions divided by soil types (arable versus pastoral), which indexed not only what kinds of livelihoods were supported but also distinct demographic, family, and inheritance patterns. Nineteenth-century factory movement activists came almost exclusively from eighteenth-century protoindustrial wool-growing regions of the English countryside, which nurtured different economic and familial cultures from those of agricultural laborers in the manorial countryside. But what this could not explain was why they expressed themselves in the language of legal rights, unlike similar European protoindustrial regions. It was then that my research turned to mercantilism and the law (Schmoller, Bucher, and the German Historical School) and especially the long-forgotten English and Swedish historical institutional economists (Ashley, Cunningham, and Heckscher).

Unique among European nations, the English state extended national labor statutes across town and country; elsewhere, labor regulations were confined to urban areas (controlled by guilds) leaving the countryside to manorial law. Intended to be forces of domination and control, thanks to England's unique participatory legal apparatus, woolen and textile workers were often able to turn these laws to their advantage (e.g. turning *maximum* wage statutes into *minimum* wages in 1603) and create a tradition of labor rights tied to the rule of law. When I looked at the varying effects of the transactions between these two forces—the protoindustrial cultures and the English law—I found that only certain measures of the law, and only certain distributions of power and public participation in the law, allowed public spheres to be transformed into quasi-democratic arenas in which early market capitalism was contained by a political and legal culture of rights (Somers, 1986, 1993, 1994b, 1995c).

The whole process was an exercise in Polanyian institutional analysis. Modern capitalism was not born of the liberation of markets from state regulation. On the contrary, the industrial revolution developed directly from the institutionalized economies in the protoindustrial regions. Capitalism revealed itself to be a political and legal social institution in which property and the labor contract were thoroughly constituted through law, power, and social relationships (Somers, 1993, 1994b, 1995c). As "new" institutionalisms have come and gone over the last decades, it's puzzling that so few have returned to Polanyi's economic institutionalism (but see Cangiani, 2021).

## 4 Citizenship

**DH:** How did this historical work on the English working class set up your later research on citizenship?

**MS:** Only at the end did I realize that my dissertation was the story of the institutional origins of citizenship rights and identities, a topic long disappeared from the social science agenda.<sup>6</sup> These were claims based on the *rights-bearing* status as “freeborn Englishmen”—citizenship identities and rights-claims derived from regionally-specific institutional nexes of the law/state, civil society, and market dynamics, all mediated through contestation in the public sphere (Somers, 1993, 1994b, 1995c).

Attention to citizenship rights formation inevitably raised broader theoretical questions about a missing sociology of rights—an absence based on the social science aversion to the normativity associated with rights. But this was and is nonsensical: Social movement actors, among sociology’s favorite subjects, display no such qualms expressing the centrality of rights, so neither should sociologists, as I argue in *Genealogies of Citizenship* (2008; and Somers & Roberts, 2008). In theorizing rights, institutionalism once again comes to the fore: However much we conceive ourselves as “rights-bearers,” from a sociological perspective rights are not individual possessions; after all, they come and go when we cross borders or move through time. Instead, rights are better understood as the *subject positions* we occupy temporarily in shifting institutional and social arrangements, and it is this variable positionality that we need to foreground in rights analysis.

**DH:** Perhaps your most iconic empirical analysis of citizenship is your discussion of the aftermath of Hurricane Katrina in *Genealogies of Citizenship* (2008). Can you talk about that, and about how that analysis centers race?

**MS:** Hurricane Katrina teaches *in extremis* what social exclusion and rightlessness look like in the face of the de facto loss of meaningful citizenship rights. The book argues that in 2005, three decades of market-driven governance had already transformed growing numbers of rights-bearing citizens into socially excluded internally stateless persons. Their statelessness was based on social exclusion from any meaningful *membership* in the polity, a condition that long preceded the hurricane. So while they had all the *de jure* rights of citizenship—the right to vote, to assemble, and access the law—they were powerless to act on their citizenship rights since they had effectively been thrust outside of the circle of the power of the regulative state. I analyze this condition of stateless citizenship to be in part a result of the “contractualization of citizenship,” in which the authority of the market transformed the meaning of citizenship from one of noncontractual shared fate to conditional privilege—making rights, inclusion, and moral worth dependent on one’s market value in a quid pro quo contractual relationship. Deemed to be without market value, African Americans were excluded from recognition as moral equals by others. Just as Arendt demonstrated that absent state-centric citizenship, having nothing but one’s human/natural rights was tantamount to death, so too were the Black stateless self-defined “refugees” of Hurricane Katrina left to their deaths.

But the contractualization of citizenship was only half the story; the other half was centuries of racial exclusion, apartheid and terrorism in the U.S. combined with grotesque accusations of Black citizens as morally unworthy “welfare dependents” and “welfare queens.” “Hurricane Katrina” is what erupted from the toxic mix of neoliberalism, white supremacy, and

6. See Somers (2008, Chs. 1, 4), where I trace and explain the fall and rise of social science studies in citizenship.

the false universality of color blindness that created the conditions of internal statelessness and rightless citizens. Without *de facto* citizenship or recognition as moral equals, no other rights are possible—legal, civil, social rights are meaningless conversation when one is abandoned on a rooftop in a flooded city.

Against this perilous mix of white supremacy and turning citizenship into a market contract, *Genealogies* advances an alternative view of rights as necessary public goods rooted in an alliance of public power, political membership, and social practices of equal moral recognition—in short, what Arendt called the *right to have rights*.

Almost twenty years after Hurricane Katrina the situation—and the racism—has worsened. White supremacy and accelerating neoliberalism easily transform yesterday’s “welfare queens”—already robbed of their moral worth and their right to be recognized as “real” Americans—into today’s accused “voting cheats” and justifies the alarming speed by which the democratic rights of communities of color (not only Black, but also Latino, Asian, and Native American) are being dismantled. Populist authoritarianism colludes with reactionary state legislatures to use violence to disrupt, delegitimize, and criminalize the institutions and the procedures that facilitate the democratic citizenship of those they name as moral outlaws and threats to the body politic (Somers, 2022).

## 5 Narratives and Identities

**DH:** In addition to setting up your later work on citizenship, your work on English history led to perhaps your most influential paper, “The Narrative Constitution of Identity: A Relational and Network Approach” (1994a). Can you tell me a little about how this paper came to be written, published, and received?

**MS:** It was my historical subjects who made me aware of the high price we pay for the fact that much of what we observe in the world (or find in history) is incongruous with how our theories compel us to talk (Somers, 1992, 1996b, 1997). Lacking a vocabulary, we often misread social reality—seeing positive claims for legal rights, for example, as negative examples of “failed class consciousness,” a case of what I have called looking through the lens of an “epistemology of absence” (Somers, 1989, 1996b). Finding a poor fit between available concepts and my historical findings, I started transgressing boundaries—between disciplines, between theory and history—and appropriating and reformulating concepts once alien to the social sciences. This led me to jettison the language of categories and attributes and instead to make *relationships* and *narrative* the central axes of analysis (Somers, 1992, 1994a, 1997, 2008 Ch.7; Somers & Gibson, 1994).

Polanyi’s “economy as instituted process” (1957), which focuses on the causal effects of varying social arrangements and the *place* of the economy relative to other social institutions, catalyzed my interest in relationality, institutional connections, and networks. In lieu of the holism of “society” I conceived the concept of a *relational setting* (Somers, 1992, 1993, 1994a, 1994b)—a matrix of institutional relationships among economic, social, and political practices and institutions, making institutional configurations and social relational networks the analytic core of my methodology. It allowed me to disaggregate categorical entities such as “the economy” and to reconfigure them as institutional clusters through which people, power, and organizations are contingently connected and positioned in empirically shifting relationships.

I did the same kind of work on the concept of agency. My English historical subjects explained their actions in the arc of historical time and memory, yet in the 1980s the concept



of narrative in the social sciences was derided as devoid of theory and excluded as the “epistemological other” (Somers & Gibson, 1994). I nonetheless appropriated and transformed it into a staple of identity analysis and dubbed the concept of *narrative identity* to capture actors’ spatially-variable “place” in networks of (breakable) rules, (variable) practices, binding (and unbinding) institutions, and the multiple stories of family, nation, or economic life. While a social category approach imputes to actors internally stable properties, narrative identity embeds historical subjects within relationships that shift over time and space, and discerns the meaning of events and behaviors only in temporal and spatial relationship to others (Somers, 1992, 1994a, 1997).

Over time I’ve continuously used the generativity of narrative in several conceptual innovations—*narrative justice* in explaining the plasticity of law (Somers, 1993, 1994b), the historical method of *causal narrativity* (Somers, 1996a, 1998), the naturalization of narrative assumptions to explain the gatekeeping epistemics of *knowledge cultures* and *metanarratives* (Somers, 1995a, 1995b, 1999, 2008 Chs. 5, 7), and the concept of the *conversion narrative* (Somers & Block, 2005; Block & Somers, 2014), to describe a rhetorical tool used to convert people from one belief system to another by telling causal stories that change perceptions of reality.

## 6 Historical Epistemology

**DH:** Beyond your turn to narrative, you also published several influential articles on the logic of historical research. What inspired this line of work? Does it also start with your dissertation and your deep engagement with the English working class?

**MS:** Yes, another dimension of my thinking that evolved from my English historical research falls under the rubric of what I dubbed *historical epistemology*, a term I use to capture the idea that the history and development of a thing (and not just the logic of its construction) can tell you something fundamental about its nature. Since collaborating with Skocpol on comparative history (Skocpol & Somers, 1980), I had pondered questions of historical methodology. In the late 1980s I brought together historical methodological concerns with those in the philosophy of science and social science to develop my thinking in historical epistemology. The term is purposefully oxymoronic: It intentionally challenges the ahistorical requisites of standard epistemology and instead proposes that all our knowledges, our logics, our presuppositions, indeed our very reasoning practices, are indelibly marked with the signature of time. They are “history laden”—a phrase meant to evoke, to disturb, and to invert the well-known Kuhnian claim that all data are “theory laden.” A history-laden perspective suggests that much of social theory is founded on unquestioned taken for granted historical claims, as I argue in “Where is Sociology after the Historic Turn” (Somers, 1996a; and see Somers & Gibson, 1994).

My most ambitious effort at combining historical methodology with the philosophy and sociology of science is “‘We’re No Angels’: Realism, Rational Choice, and Relationality in Social Science” (Somers, 1998).<sup>7</sup> “Angels” addresses the rational choice critics of historical sociology who lament its “empiricist subversion” of the theoretical aims of social science. I argue in reply that recent developments in the philosophy of science cast doubts on the critics’ un-

7. This became the touchstone of an AJS Symposium on Historical Sociology and Rational Choice Theory with Michael Hechter, Edward Kiser, Craig Calhoun, Raymond Boudon, and Jack Goldstone [*American Journal of Sociology*, 104(3), 1998].

balanced anti-historical views of theory, and introduce recent post-Kuhnian developments in the philosophy of science that I dub a *pragmatic historical realism*, which supports a relational and problem-driven approach to explanation, and a more *causal*, less law-like, view of theory. I also defend the epistemology of historical sociology against the potential tyranny of rational choice theory's anti-democratic implications by asking: If theoretical entities trump the empirical, how else but by greater power alone will social truths be adjudicated?

**DH:** Once more, your approach seems to be about middle paths through polarized theoretical terrain, here rejecting both theoreticism and empiricism in favor of something pragmatic. How did you put this approach into practice? Does this set up your work on “the historical sociology of concept formation”?

**MS:** Yes, I'll explain how I got to this. Standard Anglo-American citizenship theory makes citizenship an ancillary effect of capitalist development. Reflecting on the difficulties of convincingly recounting my alternative story, I came to recognize the power of a metanarrative—a gatekeeping naturalized “knowledge culture” that, like a paradigm, defines the spectrum of allowable propositions and adjudicates what counts as reasonable evidence (Somers, 2008 Ch.7, 1999, 1995b). Clearly, it was insufficient to simply tell my story; I had to destabilize and “un-think/untell” the hegemonic one, much of which is based not on empirical granular English history but on a grafting together of assumptions drawn from Locke's social contract theory with a naturalized neoclassical economic history. The result is a heroic narrative of the market being liberated from the tyranny of the state and setting free individual liberties based on property rights. My work found just the opposite—that without early social rights as foundations, more encompassing citizenship rights would not have been possible. That centers the law, the state, and “the people” at the heart of capitalism (Somers, 1994b).

None of this work would have been possible without my having formulated a *historical sociology of concept formation*, a method which problematizes the complex and skewed relationships between the practical world of political economy and social organization, and the conceptual vocabulary and cognitive maps that oblige us to think in certain constrained ways (Somers, 1995a, 1995b, 1999). By deconstructing concepts through historicization and reflexivity, an historical sociology of concept formation reveals that concepts taken as given have histories of contention and transformation—histories not unlike the social phenomena that we normally study. By subjecting the concepts of civil society, the public sphere, social capital, and even citizenship itself to an historical sociology of concept formation, I was able to “denaturalize” that which has hardened into the frozen thinking of hegemonic knowledge cultures (Somers, 1995a, 1995b, 1999, 2005, 2008 Ch.5, 6, 7).

Underlying all this work has been the central interplay between history, ideas, epistemology, and theory. Although I have tried to make them to stand on their own, many of the theoretical concepts and epistemological arguments I have developed have been driven by empirical historical puzzles, thus making the theoretical project at once an historical sociology. And because I believe that underlying most social theory is a particularistic view of historical events and causal processes in the making of the modern world, I have consistently argued that theoretical renewal in sociology requires a simultaneous historical deconstruction of that metanarrative/knowledge culture of Anglo-American citizenship theory. For a sociology of citizenship and rights, it is not possible to privilege either theory or history; both must proceed at once.

## 7 Encountering Karl

**DH:** Let's return to your work on Karl Polanyi. Starting with your 1984 paper on Polanyi's "Holistic social science," to your extensive explorations of the concept of "market fundamentalism," through to writings in the past year on how Polanyi can inform our understanding of the work of Thomas Piketty and the politics of "predistribution," you've explored many themes and their applications. So I'd love to talk a bit more about this.

**MS:** Let me start with my collaborative work with Fred Block on welfare reform, ideational embeddedness, and the rise of market fundamentalism. When Clinton's 1996 Welfare Reform Bill passed, its resemblance to Polanyi's discussion of England's 1834 New Poor Law in GT was too striking to ignore, as both eliminated versions of social citizenship for market-based poverty policy. In Block & Somers (2003, 2014) and Somers & Block (2005) we compare these two "welfare reform" bills and treat them as indicators in the rise of laissez-faire and neoliberalism, respectively. Most notable was the little noticed influence of early English welfare history on the political discourse of neoliberal American poverty policy. Like their English predecessors, American conservatives mobilized Hirschman's (1991) "perversity rhetoric" to forge their most significant political achievement—reassigning blame for the poor's condition from "*poverty to perversity*," in which structural problems of poverty are discredited as *empiricist illusions* while the *real* problem is redefined as poor people themselves—their sexual promiscuity, personal irresponsibility, and cultural dependency. Coupling economic sociology with a sociology of ideas, we devise the concept of *ideational embeddedness* to characterize the power of such ideas to shape, embed, and change markets. We argue that *ideas count*; but *not all ideas are created equal*. Only a successful few can fuel radical market transformations, in this case drawing on the prestige of Newtonian physics to create a structure of unfalsifiable assumptions to analyze the consequences of welfare that are immune to empirical disconfirmation.<sup>8</sup>

**DH:** How has your understanding of Polanyi evolved since you first read his writings?

**MS:** As the Polanyi fan club has grown over the years, so have claims to canonical knowledge of what he "really meant" (Somers & Block, 2020b). Since some of my views are idiosyncratic, I've taken to calling what I do simply "Polanyi-inspired" political economy (Somers forthcoming a, 2021). So, for example, there's an ambiguity in GT between Polanyi's allusions to the 19<sup>th</sup>-century economy's "disembeddedness" from politics and society, and his argument that the self-regulating market is an impossible "stark utopia," since all markets are constituted by states, laws, and social relations. I'm now convinced that for Polanyi, economic "disembeddedness" is ideational, never actually institutionalized. Instead of confused ambiguity, he's theorizing capitalism's bifurcated political economy: What *appears* to be an autonomous self-regulating market is in fact organized by legal and political engineering. The economy, in short, is *always* an "instituted process" (Polanyi, 1957; Somers & Block, 2021).

*Performativity of political economy.* Polanyi is clear, however, that while the market's autonomy is not empirically "true," as an ideational regime it is very *real*; the self-regulating market has *causal powers* to force the world to conform to its image. This makes Polanyi as much an *epistemic* political economist as an institutionalist one. By demonstrating how 19<sup>th</sup>-century social science (political economy) outweighed the effects of technology in the industrial revolu-

8. This theoretical achievement explains why welfare reformers—both then and now—have been surprisingly casual about developing serious empirical support for their arguments—yet with no seeming loss of persuasiveness.

tion, GT (pp. 124-125) distinguishes between scientific “truth” and ideational *power*—or *social facticity* (Somers, 2018). He thus anticipates by decades the “performativity of economics,” by which certain economic fictions can “make themselves true” by becoming the *engines* of social change (Bourdieu, 1998; Callon, 1998; MacKenzie, 2006; Block & Somers, 2014, p. 107).

*Ideational embeddedness.* Reading Polanyi as an epistemologist led to our concept of *ideational embeddedness*: Markets, even “free markets,” are not only constituted by coercive rules and institutional arrangements; they are *also ideationally* embedded by epistemic regimes. Neoliberalism did not disembed markets; instead, it institutionalized a regime change in which a new set of ideational stipulations designed to coerce the poor to be more responsive to market signals displaced the previous one. Once we acknowledge that ideas *do* exercise market-making powers it becomes clear that many battles over social and economic policy should be redefined not as conflicts over *whether* but over *which* ideational regime will do the embedding.

Ideational embeddedness is an analytic tool to diagnose the nature of market processes, but the strength of ideational influence relative to other factors is entirely empirical. We are *not* arguing that ideas alone can explain social or political or economic outcomes—these are determined by a complex mix of structural and ideational factors, especially the distribution of institutional and economic power. The leap from identifying causal ideational mechanisms to causal outcomes is a misguided leap we don’t make (Somers & Block, 2005; Block & Somers, 2014).

*Market naturalism.* The most important instance of ideational regime change was the rise of 18<sup>th</sup>/19<sup>th</sup>-century social and market naturalism, the make-believe story by which classical political economy reinvented the socioeconomic universe (although not the political). Society is not “like” the natural world; rather, the natural and the social worlds are one and the same and subject to the same self-regulatory biological laws. By endowing the economy with the same self-equilibrating dynamics as those of nature, market naturalism scientifically justified the economy’s capacity to self-manage distinct from the state, as only an entity anchored to the self-propelling laws of nature could usurp the government in its own administration. More importantly, social naturalism remade the ontology of the poor (or people who must work for a living) from moral beings into biologized creatures incentivized exclusively by *biological instincts* of hunger and pain, no different from bears or other animals. This justified social policies designed to trigger (incentivize) biological drives rather than human morality or social obligations, instincts that the political economists made to serve as proxies for economic motivations and activities. It is an argument about “human nature” still mobilized today to justify cruel conservative social policies (Somers, 2021, 2020b, 2008b; Somers & Block, 2014, 2005).

## 8 Market Justice, Predistribution, and Dedemocratization

**DH:** Your most recent work in this vein returns to the notion of “moral economy” and debates over morality and markets. Can you tell us a bit about what you are working on now?

**MS:** Yes, of late I’ve felt the urgency of coming to grips with capitalism’s moral economy, an urgency motivated by how often I’ve seen it argued that today’s egregious levels of social exclusion calls out for a new moral economy, often referring to Polanyi for inspiration. But one of Polanyi’s great contributions is to disabuse us of the sentimental delusion that when it comes to the economy, morality has a progressive heart. Too often misread as a story of confrontation between morality versus markets, GT instead makes clear that *all* economic matters traffic in

morality, and that those who fail to reckon with its moral justifications will fail to understand the power of capitalism.

A moral economy is a normative apparatus that justifies certain economic arrangements on the grounds that they produce morally superior—fair and just—outcomes. Capitalism’s moral economy is *market justice*—the normative claim that distributional outcomes produced by legally voluntary market transactions operating in an allegedly neutral price system are by definition morally just. Market justice teaches us that today’s most grotesque forms of inequality, economic domination, and dedemocratization are not symptoms of the absence of morality; rather, they are signature expressions of the dominant moral economy of market justice (Somers, 2021, 2020a). To explain, I point to its three most significant diktats:

1. Market justice provides the original justification for inequality, as it declares earnings and wealth result are produced by nonpolitical, nonbiased *natural* market forces. As the basis of neoclassical economics’ *marginal productivity theory*, market justice subjects humans to a *tribunal of moral worth* based on the invention of “just deserts” (Somers, 2021, 2020a, 2017).
2. Redistribution is theft. Alleviating suffering through redistributive social provisioning disrupts the organic autonomy of market forces, thus threatening efficiency and growth. More importantly, it morally violates the just distribution of rewards produced by natural laws, as per “everyday libertarianism” (Murphy & Nagel, 2002).
3. Democracy is a moral and mortal threat to market justice, as it “politicizes” the neutral economy and preys upon property rights in the effort to redistribute from the “deserving” to the “underserving.” The threat mandates *dedemocratization*, targeted above all at those accused of violating market justice—people of color, especially African Americans, and marginalized Others (Somers 2017, 2021, 2022).

**DH:** A related contemporary conversation you are engaged with concerns the idea of “pre-distribution,” or the importance of centering how regulation and state action shape market income (rather than simply redistributing it after the fact). How do you approach the topic?

**MS:** Market justice tells us that inequality evolves from impersonal objective prepolitical market forces that we interfere with at the peril of market distortions and threats to economic freedom. Naturalism is the predicate of market justice: It is wholly dependent on the market’s alleged neutrality and freedom from the coercions of politics and governance. Destabilizing market justice thus demands *denaturalization*: Actual markets work through the very power, coercion, and violence abhorred by the market naturalist ideal; free markets do not exist in the wild but are engineered to appear as such. The market is itself an allocative institution of power engineered through institutionalized *predistribution*.

Predistribution<sup>9</sup> conveys the Polanyian insight that inequality is engineered by government policies and legal institutional powers, by private law and infrastructural social relations. The concept plays on the more familiar one of redistribution: Whereas the latter focuses on government policies *outside* the economy that tax and redistribute income and profits after they have been earned, *predistribution* exposes how government policies and legal powers shape market dynamics *inside the economy* and determine those (usually unequal) pretax incomes and profits

9. The term predistribution is usually attributed to political scientist Jacob Hacker (2013), and for having been put into currency by Ed Miliband in 2012, then leader of the UK’s Labour Party. See Somers (2018) and Somers & Block (2020a) for the Polanyian roots of the term.



in the first place. It thus upends the binary that attributes politics, power, and governance to the public sphere, and freedom *from* power to the private. By putting law and government engineering into the heart of the price mechanism, predistribution puts an end to the myth of the stateless market.

As I argue in Somers (2020a, 2021), denaturalizing market justice reveals the exercise of power at its heart: Power, not neutrality or nature, decides the economic and moral status of economic actors. Market outcomes, especially our egregious levels of inequality and social exclusion, reflect not merit, justice, or fairness but the unequal bargaining power engineered into labor relations, just as corporate profits reflect not the price mechanism as neutral regulator but government-protected monopolies. Predistribution exposes how the fairness, worth, and desert attributed to market distributions are reflections of power and coercion smuggled into the “morality-free” economy under naturalism’s protective cover.

Predistribution also makes nonsense of the belief in neoliberal “deregulation.” To be sure, neoliberalism has for over four decades thrived under the deregulative ideal. Yet no more than laissez-faire, neoliberalism has never been about market freedom from power; rather it is a project that deploys political and legal power to reshape and reconstitute the market by accelerating monopoly power, driving bargaining power away from working people, and insulating against participatory rights of the citizenry—all to the effect of redistributing wealth and income upwards. The characteristic trait of capitalism’s “alchemy of misrecognition” (Somers, 2018) is that this has been accomplished all the while convincing us that the ensuing maldistributive outcomes are the result of the free market at work. Deploying predistributive political engineering to reorganize the economy by seizing and repurposing law and state power *under the guise of returning to the free market* is the signature achievement of neoliberalism (Somers, 2018, 2021). Deregulation is simply the term of neoliberal art for upwards redistribution. Predistribution teaches us that market justice fashioned a morality of deceit that occludes the political power that advantages wealth, all the while misdirecting us to see maldistributive market outcomes and the suffering they inflict as the result of natural free market forces and the unimpeachable morality of market justice.

Predistributive analysis has also been at the center of my recent work examining Piketty’s influential work through a Polanyian lens. In his first acclaimed volume, in which neither predistribution nor Polanyi’s name appears, Piketty (2014) develops the famous  $r > g$  model, implying that inequality results from economic relations free of political power. Predistributive analysis disrupts Piketty’s misplaced naturalism by centering legal and institutional power (Somers & Block, 2020b; Somers, forthcoming a). *Capital and Ideology* (2020), however, names Polanyi as one of the book’s major influences. This provides a kind of natural experiment: What difference does it make to his thesis ex-ante Polanyi versus ex-post? Apparently, a great deal, as Piketty (2020) prioritizes institutions, ideology, and politics over naturalized economics, and attributes greater causality to predistribution than redistribution in driving inequality.

**DH:** A last strand of your work tried to bring this Polanyian approach to predistribution specifically back to questions of democracy — coming back, in some sense, to your earliest interests in citizenship and rights, armed with a few more decades worth of theoretical and empirical equipment. What’s next for democracy? How can this moral economy lens help us through our present predicaments?

**MS:** *Predistributive dedemocratization.* Once we recognize that freedom of the market from political power is but a powerful performative fiction the critical question is whether those powers and coercions will be democratic or authoritarian. Yet from the outset, as in

market justice's anti-democratic diktat enumerated above, *market society has aspired to be free from democracy*. Although the history of repressing democracy in the public sphere (voter suppression, Jim Crow, etc.) has always been the more conspicuous, what I've dubbed as *predistributive dedemocratization* is more foundational as it hardwires—and naturalizes—*dedemocratization* into the heart of the economy by excluding ordinary citizens from exercising democratic influence over the processes that shape their livelihoods (Somers, 2021). Polanyi demonstrates how the American Constitution prevented democratic "contamination" of market processes by instituting a constitutional firewall between economy and politics, thus policing the boundaries of politics and shielding market "efficiency" from political and moral considerations of equality and distribution. Predistributive dedemocratization also works through the disproportionate property rights allocated by the state to the firm that insulates it like a "private government" (Anderson, 2017) from the democratic influence of its own workforce, as per legal realism.

Predistributive dedemocratization thrives on the threat of pitchforked masses preying upon defenseless property owners. Four decades of neoliberalism have rendered ludicrous this narrative of capital under assault by a rapacious democratic mobocracy. Predistributive dedemocratization has instead institutionalized structural bulwarks deep inside the market economy to bar the democratic citizenry from wealth and property. From the constitutional firewall between politics and property, to the prohibition of workers' voices in "private governments," to the judicial support for monopoly and monopsony, to the dedemocratized central banks and global financial organizations, naming the problem as "too much democracy" is risible.<sup>10</sup>

History, in fact, demonstrates the reverse — predistributive dedemocratization allows property owners to prey upon the demos. Indeed, it has been the refusal of business interests to tolerate socioeconomic reforms that precipitated not merely plutocratic control of governance but moves to eliminate democracy altogether. Writing in the early 1940s at a moment of indeterminate futurity, Polanyi ends *The Great Transformation* by forcing us to confront the fork in the road that presaged global fascism in the 1930s. It was precipitated by an impasse between the forces of social democracy, primarily seated as labor parties in Parliaments, demanding economic reforms, social protections, and democratic control over currency on the one side; on the other, the global capital elite, operating fully according to the diktats of the gold standard, refusing to concede to the slightest whiff of "interference" in currency or national economies. The fascist solution to the impasse, Polanyi writes, "can be described as a reform of market economy achieved at the price of the *extirpation of all democratic institutions*" (GT, p. 245). He continues: "The victory of fascism was made practically unavoidable *by the liberal obstruction of reform* involved planning, regulation, or control" (GT, p. 265, italics added). Faced with the choice between authoritarian protection of capital or social democratic reform, global elites decried the latter as tantamount to the expropriation of property and cried out in anticipation of what Hayek called "the road to serfdom."

Echoes of the calamitous fate of Europe in the 1930s are found in today's extreme social exclusions and surging market authoritarianism. The complicity between the American Republican Party, a colluding juristocracy, and a neofascist populist base underscores that it is not free markets or market justice that is threatened by democracy, but democratic citizenship that is threatened by the contemporary moment of what Polanyi saw as capitalism's innate antidemocratic ethos. What Polanyi can't help us with today is democracy itself being used as

10. The neoliberal campaign against "excess democracy" began with public choice (Buchanan and Tullock, 1962) and the Tri-Lateral Commission (Crozier et al., 1975) and see MacLean (2017).

the means to achieve autocracy. In his time, democracy was the alternative to fascism; today, seizing the machinery of democracy is often the pathway to autocratic success. As authoritarianism has spread, so have sham elections in which the outcomes are predetermined by control of the electoral apparatus. I wish I could be more optimistic.

**DH:** Thank you so much for your time. To end on a Polanyian note, perhaps we can hope that the clear-eyed analysis you laid out may help us resign ourselves once more to the social realities we confront, to accept “the reality of society,” and in so doing gain (as Polanyi predicted) an “indomitable courage and strength to remove all removable injustice and unfreedom.” It sounds like we’re going to need it!

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