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KOCHANOWICZ, KULA, BACKWARDNESS. REGARDING THE STUDIES OF EASTERN EUROPEAN PERIPHERIES

Professor Kochanowicz's research on the economic backwardness of Polish lands is best understood when viewed as the crowning achievement and a synthesis of his previous studies on peasantry, as well as comparative studies on the post-communist transformation carried out in the 1990s. This research also contains traces of his earlier work, when he was a pupil and doctoral student of Professor Kula, and of his interest in Third World economic systems and slavery in both Americas. Kula's interests and approach certainly had an impact on Kochanowicz's research work, but not an overwhelming one.

The most important works along this line are the texts collected in the book *Backwardness and Modernization. Poland and Eastern Europe in the 16th–20th Century* (from 2006), one of his more recent texts, *Duch kapitalizmu na polskiej peryferii* from 2010, and an older text *Transformacja polska w świetle socjologii historycznej* from 1998. Another important element of Kochanowicz's studies of backwardness was the academic editing of books on this subject. In this respect, the prefaces to the works he edited or translated: *Niewolnictwo w Nowym Świecie* [Slavery in the New World] (with Marcin Kula) in the volume *U genezy konfliktu etnicznego* [Genesis of ethnic conflict], Witold Kula's *Historii gospodarczej Polski* [Economic history of Poland], Fernand Braudel's *Kultura materialna, gospodarka i kapitalizm* [Material culture, the economy and capitalism] and Albert Hirschmann's *Lojalność, krytyka, rozstanie* [Loyalty, critic, separation] – are decidedly more important than is usual.

When comparing Kochanowicz's and Kula's approach, I determined there were similar issues discussed in their works. In this part of the article I will discuss two of them. Firstly, their shared interests: studies

of Eastern European backwardness. I will show how, on a theoretical level – explaining backwardness – Kochanowicz also conducted research in areas which had not been indicated by Kula, which is a major difference between the two academics. Why Kochanowicz strayed off the path pursued by Kula is, to me – who am inspired by the hybrid development model – a fascinating theoretical and psychological issue, but I will not discuss this in the present article. Secondly: their common approach – the interdisciplinary nature and integrity of their research, which promised a long perspective and wide comparisons.

Backwardness, peripherality, dependence

Kochanowicz's studies of Eastern European backwardness consisted of two interrelated threads, which were, however, separate from an analytical point of view. His work in the 1980s and 1990s involved searching for macro-interpretations of the region's economic history; cultural arguments were not of the utmost importance for him. Towards the end of the 1990s and in the twenty-first century he was more often occupied with economic culture related to backwardness.

In all articles concerning the development and backwardness of Eastern Europe published by Kochanowicz in the 1980s and 1990s, the main research questions/problem to be resolved is Eastern Europe's dependence on Western Europe. The question/problem is worded according to the theory of dependence and Wallerstein's global system: was Eastern Europe the raw material-producing periphery of the developing global capitalist system which had its capital city first in Amsterdam, and then London since the sixteenth century, dependent on the terms of trade and demand from that part of the world? Were Polish noblemen – the owners of commercial farms – therefore agents of global capitalism, and capitalists themselves, albeit unconsciously? That was the discourse at that time, particularly since, in the West, the interest in the economic history of Eastern Europe was supported by academics who were related to Wallerstein, such as his rebellious student Daniel Chirot.

Kochanowicz, in cooperation with Chirot, created a different interpretation of the serfdom-based farming system. The nobleman's farm was not a capitalist enterprise, and the nobleman was not an entrepreneur, because the farm did not depend on export. Even if goods were exported, the farm was more prone to economic isolation, self-sufficiency, intended to feed the residents and satisfy its own consumption

demands. It was not a market institution in the basic meaning of the term: it could not go bankrupt, even if the owner did. Land and luxury goods were the only investment possibilities. Therefore, the system was totally independent. "Manorial economy formed part of the European market, but in the culture of the Polish nobility we find high esteem of isolation and autarky."[1]

In these articles Kula's influence is not as pronounced as the struggle with the model of peripheral development, dependent on a capitalist core, and the modernization theory. The author who used it the most consistently in Polish historiography was Marian Małowist – not Witold Kula. Małowist was not acquainted with the dependence theory of Latin American academics or with Wallerstein's works, and his research did not relate to them.

In Kochanowicz's article dating from 1995 *The Economy of the Polish Kingdom. A Question of Dependence*, one of the interpretations is Kula's vision of the pre-modern Polish economy as a scene of 'a coexistence of asynchronism'. It is presented as a vision able to avoid the weaknesses of two dominating paradigms: both the dependence theory, and the modernization theory, which are in ideological conflict. Ultimately, two out of the three principal differences between industrialization and development in the Kingdom of Poland, and classic modernization are identical to those indicated by Kula: "changes in the Polish lands were not caused by indigenous factors, but, instead, mostly by factors external to society […] 2) this process took place in conditions of growing economic backwardness."[2] Kula's third observation: "political dependence on Russia made a 'normal' pattern of modernization of cultural and political life impossible"[3] was not indicated, because it could not be shown as being too anti-Russian (and therefore too anti-Soviet, as interpreted by the then censors). Kula – like other economic historians of the period – truly believed that the ethnic, national aspect of the policy was immaterial compared to the class aspect (this does not appear in Kula's private diaries). In Kula's discourse, the national state is not presented as being an important institution which – as Kochanowicz believed, and which is universally accepted – created Western modernity, including its economic dimension. Although this was

[1] J. Kochanowicz, *Backwardness and Modernization. Poland and Eastern Europe in the 16th–20th Century*, Aldershot, 2006, p. 939.

[2] Id., "The Economy of the Polish Kingdom. A Question of Dependence", in: *Finland and Poland in the Russian Empire. A Comparative Study*, ed. by M. Branch, J. Hartley, A. Mączak, London, 1995, p. 126.

[3] Ibid.

supposed to argue against the application of the modernization theory to nineteenth-century Eastern Europe, it also countered the theory of dependence and Wallerstein's core-periphery approach. Latin American societies, for whom the theory of dependence was developed, could be dependent (or liberate themselves) from the Western – European and American – capitalist core, not only in terms of sources of capital, luxury goods, purchasers of raw materials, but also politically.

A common feature of various studies on independence is the tendency to emphasize the destructive impact of the ties between postcolonial countries and the West. The opposition between the developing, rich, internally democratic and externally imperial core, and the dependent, poor, authoritatively governed periphery, which lacked strength in international relations, became the basic model which explains the theory of dependence. As Kochanowicz wrote under the headword 'theory of dependence' in the *Encyclopaedia of Sociology*, periphery is characterized by "external control over export enclaves, and industrialization occurs under the control of international corporations which, however, take away more profit than they reinvest. Urbanization processes are accompanied by increasing social inequality and marginalization of the masses. The industrialization strategies pursued contribute to inflation, which leads international capital to support repressive bureaucratic and authoritarian regimes."[4] Therefore, the periphery's position in the global division of labour, and the imposed terms of trade and authoritarian national governments supported by the core, which guarantee profitable penetration by the core, were considered to be the main obstacles in the periphery's development. In this interpretation the peripheries were doomed to delivering raw materials, the prices of which are kept low by core buyers, and to importing technologies and highly processed products at prices which were overstated by central, monopolistic, large corporations.

However, relationships in Eastern Europe differed. The economies were dependent on technologies, sometimes on specialists, loans and banks in the West, but on the other hand, they were dependent on one of the peripheral empires which, according to contemporary standards, were also backward. This dependence was of a political nature, with the threat of military violence, but also financial, when, for example, the state army was the recipient of the goods, or the state was the

[4] J. Kochanowicz, "Teoria systemu światowego", in: *Encyklopedia socjologii*, vol. 3, Warsaw, 2000.

guarantor of a loan. Therefore, 'dual dependence' – from the capitalistic core and from the bureaucracy of the backward empire, so characteristic of local societies, did not fit well into the theory of dependence. "Politically, the Polish Kingdom was dependent on Russia, and that led to its industrial development. At the same time, however, it remained peripheral in relation to the West, not in the sense that it produced primary materials for Western markets (although it did), but rather because much of the best 'human capital' – technologies, managerial and organizational expertise, and last but not least, the challenge of industrial civilization – came from the West."[5] Moreover, as Kochanowicz noted, the Kingdom of Poland was the most industrialized part of the Russian Empire and not so much a supplier as a recipient of raw materials from the depths of that country. This observation is even more accurate with regards to Bohemia in the Habsburg Empire, or even the Balkans, which had the densest railway network and first industrial plants in the Ottoman Empire. The predecessor of the dependence theory – Lenin's and Rosa Luxemburg's theory of imperialism – tackled the problem in the same way that Kula did, believing class war and economic dependency to be more important than wars between nations and political dependency.

Backwardness versus culture

The second theme in studies on backwardness is the study of the culture – values, beliefs, and the positions taken – which accompanied it. Therefore, Kochanowicz argued that since the promulgation of capitalism in Western European countries, the economies of Central and East European countries should be treated as peripheral. In many works dating from the 1990s he argued that it was the dominant position of nobles compared with other social groups – the bourgeoisie and the peasantry – and the state, and not simply international trade relations which were unfavourable to the periphery, which did not allow capitalism to develop in Poland, Bohemia and Hungary. "Domination of the aristocracy over the bourgeoisie and towns prevented the development of capitalism, and that was the key" in the pre-industrial period[6]. Nineteenth-century industrialization in Central and East European

[5] Id., "The Economy of the Polish Kingdom..., p. 126.

[6] Id., *Spór o teorię gospodarki chłopskiej. Gospodarstwo chłopskie w teorii ekonomii i w historii gospodarczej,* Warsaw, 1992, p. 119.

countries did not fundamentally change either the social structure, or the dominating mentality.

The essay written by Kochanowicz and Marcin Kula in 1980 appears important for the image of a society in which noblemen were in the minority, and who after 1864 had no privileges. In their essay, the authors agreed with Eugene Genovese, a researcher on slavery in the southern United States of America, that the hegemony – cultural domination – of rich planters, owners of over fifty slaves, who constituted a small percentage of the population, was responsible for forming the mentality of Southern society. Even in such a formally egalitarian society as American society, the mentality of bonds with the land, thinking in the category of families, attachment to customs and attire, strong social divisions, including racism, were characteristic of the region long after slavery had been abolished.

As Kochanowicz pointed out in his article *Duch kapitalizmu na polskiej peryferii: perspektywa historyczna* (2010), which summarized his research on economic culture, the noble lifestyle remained a model of the 'good life' in Poland at least until the Polish People's Republic. Aversion to trade, and the calculation of financial profit and loss, accompanied by a passion for lavishness, etiquette and social life were such a permanent element of the culture that they became the model for the new bourgeoisie, including Polonized foreigners and Jews, as well as the Intelligentsia, which appeared at that time, as well as socially promoted peasants. This image is consistent with the message conveyed by the studies of Jedlicki, another of Kula's students and collaborators, which showed an astonishing attachment to the customs of the nobility, whose only function at the end of the nineteenth century was to differ from the remainder of society and cultivate ties within their own group.

In this sociological and historical interpretation, clientilism, which connected the magnate class with the poor, and the 'shrewdness of peasants', which consisted of them not fulfilling their duties regarding servitude in the period before 1795, developed into a 'long lasting' structure, which contributed to the creation of a modern, depersonalized bureaucracy, the corruption of public officers and effectiveness which is cultivated only in small family companies in the twenty-first century.

Ultimately Kochanowicz never decided what the causal relationship was: whether some features of the culture contributed to the backwardness, or whether economic weaknesses triggered some features of the culture. In his work, his views on this matter are less clear than on other issues. "I would not go so far as to adhere to a culturalist explanation

of the origins of capitalism as to suggest that this mentality lay at the roots of the lack of capitalism in Poland. On the contrary, I rather think that it reflected a certain reality and rationalized it."[7]

He wrote about it in an EgoLecture at the CEU in 2014: "As a historian, I have an intuitive conviction that culture matters profoundly for human behaviour, including economic activity. At the same time, I cannot dismiss the doubts of many economists […] For instance, in the case of the same region, South-East Asia, culture has been invoked as well as an explanation of stagnation, as of rapid growth. […] For my part, I often hear (and repeat, as I have done here) the arguments and examples of the 'burden of the past,' shaping the behaviour of each generation. At the same time, I have difficulty in precisely identifying the mechanisms of social transmission of patterns of behaviour, cognitive schemes, and mental attitudes from one generation to another."[8]

I do not think that this uncertainty as to what came first: ideas, culture, mentality or harsh economic reality, is surprising. It is not an academic question, and the answer does not have to be related to the respondent's views. Eugene Genovese, the author of *Materialism and Idealism in the History of Black Slavery in the Americas*, which was translated by Kochanowicz, suggested that the two parts reinforced each other dialectically. This also seems to be Kochanowicz's position on the relationship between culture and backwardness.

Method. Interdisciplinary nature

Kochanowicz's work is a continuation of the best methodological traditions which derive from Kula. It transgresses historical epochs and cultural regions. It introduces problematic, rather than factographic questions to historical research. They also tend to generalize – which for historians focused on discoveries and detailed analysis of source materials is difficult to accept. The characteristic feature of Kochanowicz's work is that it searches for historical interpretations which are important from the perspective of the present, and not only that of professional historians, and also from the perspective of environmental standards of historical departments and institutes. All these features of Kochanowicz's work are due to his erudition in three areas

[7] Id., *Backwardness and Modernization*..., p. 939.

[8] See: http://history.ceu.edu/article/2014-10-06/Jacek%20Kochanowicz%20(1946-2014)%3A%20An%20Escape%20into%20History (2 IV 2015 r.).

of social studies: history, economy and sociology. This was partly the result of his friendly interest and keeping up to date with successive intellectual fashions in general and economic historiography, from the core-periphery approach, postmodernism to, more recently, cliometrics which is the application of the theory of economics and statistical methods to the study of history. Although interested in novelties, he distanced himself from them more than Kula did and was convinced they would be followed by new ideas and methods.

Method. Historical sociology and long duration

In methodological terms, these studies cover historical sociology. According to Karl Popper's definition of a good interpretation in humanistic studies, Jacek Kochanowicz's historical research highlighted the Polish and East European present: its economic weakness compared with Western European countries. Kochanowicz applied theories bordering on economics, history and sociology to his historical materials such as those developed by Fernand Braudel, Immanuel Wallerstein, Alfred Hirschman, and Witold Kula, as well as economic models. They attempt to explain post-communist Europeanization as yet another attempt by Eastern European and other peripheral regions in the world to emerge from economic backwardness. Texts on the economic culture of modern Poland adopt a similar historical and sociological perspective. They emphasize the need to appreciate the peasant genealogy of what is basically the majority of the Polish population. Kochanowicz also used another method of historical sociology: an analysis of the social structure and mentality of past, now non-existent societies, which is visible in the studies of peasant economics and economic culture which he undertook with Mirosława Marody.

In his approach, which combined the methods developed by sociology, anthropology and economy to analyse long-term social processes and past societies, Kochanowicz continued Kula's methods. However, Kochanowicz's approach was more systematic, and less geographically indifferent. The main circumstance which enabled it was the fact that historical sociology only became institutionalized in the 1970–1980s, after Professor Kula's most intense period of professional activity. In 1982 historical sociology was ultimately recognized as a separate area of sociology by the American Sociological Association – when the Comparative and Historical Sociology Section was established.

Method. Historical sociology and extensive comparisons

Both Kula, and three other thinkers, who at various stages had been of importance to Kochanowicz's research and had had an impact on his way of thinking about Eastern European backwardness, conducted research on the economy of Latin America. Braudel and Wallerstein, like Kula, believed that the two regions were the first peripheries of the global capitalistic system, and in the 1950s Hirschman advised Latin American countries from Columbia. Kochanowicz wrote the prefaces to Braudel's and Hirschman's books, and also translated them as he had *The Economic Development of Poland from the 16th to the 18th century*.

Significant aspects of economic history led to differences between Eastern Europe and Latin America, as Kochanowicz indicated. The most important, it seemed, were not the structure of trade and dependence, but a comparison between the social structures characteristic of the two regions. According to Kula, the early history of Eastern Europe from the period of The Netherlands' and England's economic and colonial expansion, was also similar to the fate of European colonies in both Americas. "If, despite the low labour efficiency and high costs of long marine transport the products of those 'colonies' (Eastern Europe on the one hand and American colonies on the other) they win and may be sold favourably on English and Dutch markets, there may only be one explanation – lower cost of labour, which is cheap as it is subjugated: in Europe – by serfdom and in America by slavery."[9] "Grain from Eastern Europe" versus "cotton produced by Negroes". The low price of grain and cotton for West European customers, and the attractiveness of profits for the local landlord were – taking into consideration the low labour efficiency, the result of the same system of using labour – "slaves, who later became only officially free men" in America, and "serfs, and then peasants whose mobility was related to having small, often dwarf-size farms" in Eastern Europe.[10]

Kochanowicz diagnosed similar forms of farming, opposition to the landlord and mentality among serfs in Poland and Russia, and slaves in both Americas. Similarities and differences between serfs and slaves are well described in the volume of third party articles *U genezy konfliktu etnicznego* and the respective preface *Niewolnictwo w Nowym Świecie* written jointly with Marcin Kula, as well as in

[9] W. Kula, "Zacofanie gospodarcze", in: id., *Historia, zacofanie, rozwój*, Warsaw, 1983, pp. 187–188.

[10] Ibid., p. 192.

Spór o gospodarkę chłopską. Both the difference between peasant and landlord, and between the slave and owner, constituted a difference in their legal position.

Both the peasant and slave were bound; in Eastern Europe this usually related to land, and in the New World, to the owner. In both instances, their position was characterized by an inability to be geographically mobile. In both instances, social mobility was also restrained. The caste system was binding, and social boundaries could not to be surpassed. Similarly to slavery, the serf-based system was responsible for the lack of inter-generational continuity thereby discouraging intergenerational memory among serfs. Both systems prevented establishing bonds outside the family among serfs or slaves, other than the bond with the lord, and encouraged lack of trust in respect of neighbours due to control by the manor. A slave, especially in the USA, where racial boundaries were more distinct than in Latin America, and inter-racial relationships were banned, was an uprooted person – an outsider who had no possibility of putting down roots, an 'ethnic intruder'. Serfs had an opportunity of establishing somewhat stronger familial bonds, because it was not people that were sold but villages with the people; serfs were encouraged to marry and create nuclear families, and plots of land could be inherited. Genovese's studies showed Kochanowicz that there were similarities between some aspects of serfdom in Poland and slavery – more in the USA than in Latin America. In the United States of America black slaves worked almost exclusively on plantations, like serfs, whereas in Latin America – where there were less white settlers – they had various functions. Both in southern, and in central and western Poland, estates were small and thus contacts with the landlords were so close that the manor, with its behaviour and aesthetic standards, became the model of the good life. The larger the estates – as in Russia or borderland Ukraine, which was part of the Polish-Lithuanian Commonwealth, and in the Caribbean – the larger the cultural autonomy of the enslaved population. Village or black culture – authoritarian, misogynist – could unashamedly form a separate model of behaviours and values. The resistive economy was more characteristic of both slave-worked plantations in the USA and small manor farms in central Poland than open rebellion: feigning work, neglecting, pretending, stealing. Rebellions were only possible in locations where the peasants or slaves lived far away from the landlord: on the Eastern Borderlands or in the Caribbean. Paternalism as an ideology, which obliged the landlord to care for the serf in return for the serf's labour, formed the mentality of the

region's society. The situation was similar in the South, where many social groups made up a hierarchy, but "the social groups which differed significantly were characterized by an extraordinary consensus regarding values. Great planters […] invested white society with style and were imitated by the lower classes."[11]

The end. The bridge between historians, sociologists and economists (and not only history, sociology and economy)

Once again using Popper's metaphor, the approach of historical sociology is characterized by looking at the past from the perspective of its importance for the present. Kochanowicz turns the spotlight on those fragments of the past which enable him to understand occurrences that are important for the present. The issue of the marginal position, weakness (backwardness) of the Polish economy and its East European neighbours, and the economic culture of the Poles are of utmost importance.

Sociologists value them as a unique opinion in the debate on the subject. Kochanowicz showed that post-communist transformation and Europeanization were one of many projects for modernizing peripheries in Latin America and Asia. Furthermore, what is important both for sociologists and historians – he pointed out that it was another attempt by Polish lands to emerge from their backwardness, which included the limited industrialization which developed after serfdom was abolished in the second half of the nineteenth century and which came under the patronage of the newly-established Polish state in the interwar period.

Kochanowicz became a promoter of the historical sociology of East European backwardness. Kula's studies and the resulting tradition of looking at Poland and its neighbours became available to economists and sociologists in the region – where he cooperated with IWM and CEU – and from farther regions. Under the influence of Kochanowicz's publications, they also became popular among Polish researchers: historians, but not economic historians, sociologists, people studying culture and activists during the past 10–15 years.

At the same time Kula is perceived among economic historians and economic demographers as being a representative of binding, widely-held

[11] *U genezy konfliktu etnicznego. Głosy w dyskusji o niewolnictwie w Amerykach*, ed. by J. Kochanowicz, M. Kula, trans. E. Gajewska, J. Kochanowicz, M. Ruiz, Kraków, 1980, p. 15.

and sometimes thoughtlessly repeated opinions. I suggest looking closely at this paradox. When we, as outsiders, treat Kula's approach as being fresh, invigorating and contrary to traditional thinking about Polish society, according to economic historiography Kula represents everything that is widely-held and conservative in the way of thinking about the societies and economies of Eastern Europe. Young and middle-aged economic historians confront their studies with the picture of the region which – through Kula's publications dating from the 1960s – became part of the global canon. In his recently article, published in book *Drogi odrębne, drogi wspólne* edited by Maciej Janowski, Krzysztof Kowalewski of the Institute of Slavonic Studies presents the status of research on serfdom in Eastern Europe[12]. Paradoxically, in my book and the discourse of sociologists, Andrzej Wyczański provides historiographic support for the currently hated modernization theory. Kowalewski refers to him as the only researcher who in the 1970s and 1980s was a forerunner of the approach to serfdom and the indistinct, non-dichotomist divisions of Europe, which became popular in historiography as late as in the second half of the 1980s. Kochanowicz was a supporter of the message contained in Wyczański's studies which emphasized the differences in the various regions of Eastern Europe. Like Wyczański, he believed that the main source of those differences was the social structure and the degree of influence of Western European culture on the customs and mentality of contemporary elites – first that of the nobility, then the bourgeoisie and finally the Intelligentsia. Like Jedlicki, he also believed that the pre-modern lands of Poland, Bohemia and Hungary, which used serf-based labour, were like the 'outskirts' of Europe, with a social structure and culture similar to those of the Third World, including Latin America, however more like a poor relative of Europe than a totally different region.

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[12] *Drogi odrębne, drogi wspólne. Problem specyfiki rozwoju historycznego Europy Środkowo-Wschodniej w XIX–XX wieku*, ed. by M. Janowski, Warsaw, 2014.

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Kochanowicz, Kula, backwardness. Regarding the studies of Eastern European peripheries
(Summary)

The article offers an analysis of the main strands of Jacek Kochanowicz's research into the backwardness of Eastern Europe. The author attempts to answer the question concerning the extent to which Kochanowicz's 'backwardness studies' built on the research he had carried out earlier under the supervision of Witold Kula.

Kochanowicz differed from Kula in his explanation of the economic backwardness of Eastern Europe. Kula, in explaining this phenomenon, stressed the fact that in the sixteenth to eighteenth centuries Eastern Europe relied for its resource bases on the capitalistic centre and that institutional changes occurring in the area in the eighteenth to twentieth centuries were of a hybrid

nature. Kochanowicz, by contrast, argued that the backwardness of Eastern Europe originated in the economic (from the sixteenth century on) and cultural (from the nineteenth century) domination of the Polish nobility whose mentality did not favour the growth of entrepreneurial spirit. In addition to the domination of the nobility, the causes of Poland's backwardness lay in the weakness of Polish towns and of Polish peasantry. However, Kochanowicz continued to draw on the methods used by Kula. Interested in sociology and anthropology, he developed an interdisciplinary approach to economic history, adopting a longue durée perspective and using broad comparisons.

Key words: economic backwardness, Eastern Europe, historical sociology, serfdom, Witold Kula, Jacek Kochanowicz