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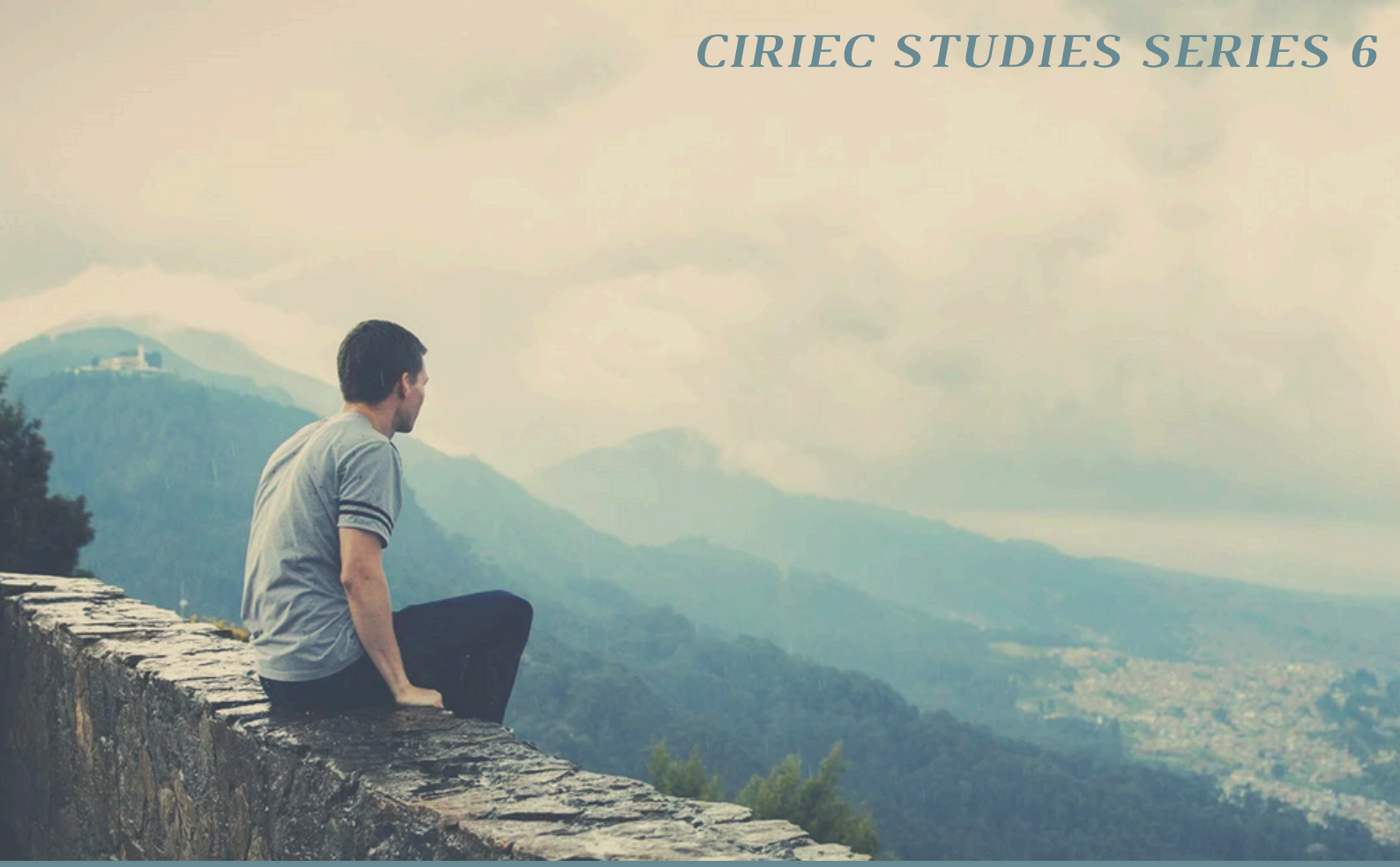

CHAPTER 8

THE SOCIAL ECONOMY AND UTOPIA: PARADOXES, REALISM AND THE THEORY OF COMPLEX SOCIAL SYSTEMS

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Chapter 8

The Social Economy and Utopia: Paradoxes, Realism and the Theory of Complex Social Systems

Ermanno C. TORTIA*

Abstract

This chapter considers utopia as prospective statements about social realities, representing "pole stars" for developing social thinking in development programs and policies. It aims to reconstruct the concept of utopia from a social economy point of view, striving to highlight what conceptual criteria can be used to classify different types of utopias, especially "feasible" and "unfeasible" on the one hand, and "good" and "bad" utopias on the other. To achieve these results, elements of complexity theory, social systems theory in the social sciences, and critical realism in philosophy are considered. Some examples referred to organization in the social economy are used to show how definitions and conceptual categories can be applied to real-world cases, or to utopian ideas that achieved some degree of relevance in culture and science (Hedrén, 2014).

Keywords: utopia, complexity theory, social systems theory, critical realism, paradoxes, social economy organizations

JEL-Codes: A13, B55, L31, O35, Z13

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1. Introduction

The reconstruction of utopias as perspective statements about social reality requires the search for conceptual criteria to classify different types of utopias, the "good," the "bad," and the "ugly", and also the "realizable" and "unrealizable" (Barclay, 1993). Realizable utopias are, at least in principle, realizable in reality, while unrealizable utopias are not realizable, but may nevertheless carry with them important social or normative meanings and function as "pole stars" that cannot be attained, but chart the course for social change.

Good or positive utopias are programs of social change that have an intrinsic or normative progressive relevance to social reality, aiming to build new and better social structures and institutions, and also have universal value, that is, they affect, at least potentially but not necessarily, all individuals, social groups and nations equally. They tend to promote equality and strengthen the civil rights and individual liberties of entire populations (Rawls, 1971, 1999). In contrast, negative utopias are conceptualized as claims about social change that are inherently regressive, aimed at reconstructing social structures and institutions that have already ceased to exist, to favor specific social groups or nations over others, rather than society and humanity at large. They tend to promote inequality, privilege and the restriction of civil rights (Walby, 2007).

The conceptual approach of the chapter does not set out explicit proposals for transformative social change. It is instead concerned with critical approaches to existing social realities, such as critical realism and social systems theory, and the underlying potential for transformation in the direction envisioned by such approaches (Warren, Franklin & Streeter, 1998; Levitas, 2007; Fischer-Lescano, 2012). Preference is given to the analysis of social change processes, whose outcomes can be qualitatively foreseen, but cannot be accurately predicted in quantitative terms; even so, they hold the potential to bring about relevant social and economic improvements (Levitas, 2007).

In this line of enquiry, utopia can be understood as projections on social realities that anticipate some fundamental cultural or structural changes leading to improvements in society and the economy, which can be partial and localized, but also systemic. The premises of utopian thinking are very uncertain by their very nature, but not devoid of meaning and potential for influence on society. In some cases, it may be reasonable to expect such forward-looking statements to have some degree of realization. In others, they represent unrealizable developments, but may nonetheless play a positive role by serving as catalysts for social change. Regressive utopias or dystopias play a negative role in the evolution of human societies and are often based on irrational assertions and projections about social reality, for example, they may lack universality and respect for the social integrity and civil rights of specific ethnic or religious groups, or entire nations (e.g. the creation of a new colonialist order based on the exploitation of weaker nations, Levitas, 2007).

The second section of the chapter reviews some conceptual elements from different theoretical streams. Specifically, elements that can be used to evaluate utopian thinking are considered in critical realism in philosophy, social systems theory and complexity theory in social sciences. In the third section, an attempt is made to construct a new analytical framework that dissects the main elements of a philosophical and scientific analysis of utopias, as applied to the social economy. The fourth section offers a final discussion.

2. Conceptual background

The conceptual background of this chapter strives to provide some conceptual tools of analysis, involving elements of some theoretical and philosophical currents that have been strongly concerned with studying the nature of social systems. Critical realism and paradoxical thinking in social philosophy are considered along with complexity theory and social systems theory for their ability to analyze emergent properties of social systems (e.g., new institutions or new cultural or political trends), making as few assumptions as possible about the nature of the system itself to begin with, and about how it may evolve (Warren et al., 1998; Byrne & Callaghan, 2022).

2.1. Paradoxes in the social sciences and critical realism

This contribution challenges the idea that utopias cannot be realistic by resorting to a speculative methodology related to the ontology of social reality. Critical realism aims to study social reality "as it is", or "the way the world works", but it also includes a critical and constructivist stance towards social realities and ontology. In other words, it investigates their deep structures to understand real changes in the past and possibilities for change in the future (Kenyon, 1982). Since social systems are understood as complex entities characterized by emergence, critical realism is used to assess the potential of social thought to offer new theories and applications that can lead to reform proposals.

Paradoxical thinking can discern contradictions and anomalies in social realities and social thought, and the possibility or need for reform in the present state of affairs.

> By framing recurring tensions as a paradox – a 'persistent contradiction between interdependent elements' (Schad, Lewis & Smith, 2019, p. 10) – scholars endeavor to explore opposing elements' relationships. The paradoxical elements form a duality in that they are 'oppositional to one another yet […] also synergistic' (Smith and Lewis, 2011, p. 386); they thus simultaneously support and oppose one another (Farjoun, 2010). In Schad and Bansal (2018, p. 1492).

To the extent that "utopia" and "realism" are considered an oxymoron, paradoxical thinking refers to the "persistent contradiction between interdependent elements", which affect social reality but may be, at the same time, anomalous and contradictory (Kenyon, 1982; Schad et al., 2019, p. 10). When distinct concepts come together and are imagined as a unity, they constitute a paradoxical duality that embodies "a both/and relationship that is neither mutually exclusive nor antagonistic" (Putnam,

Fairhurst & Banghart, 2016). Thus, opposing elements within the same unitary system can generate paradoxical interactions leading to system-level outcomes that can hide, but not eliminate, radical contradictions within the system itself. More importantly, hidden contradictions can develop and grow over time, leading to nonlinear dynamics and systemic change that was not foreseen or even foreseeable in the first place (Roth, Schneckenberg & Valentinov, 2023). Paradox can even be understood as a type of heuristic that allows the detection of anomalous or contradictory elements in a system and to foresee steps towards a solution. Change can come from within the system, but it can also be the result of more dialectical reform processes derived from external phenomena and/or decisions. The interaction between internal change and external intervention is, as always, complex and, by its very nature, the results difficult to predict. To the extent that utopian thinking aims to alleviate social problems and envision structural changes, the dependence of utopianism on paradoxical thinking seems unquestionable (Dooley, 1997).

Realism enters into this picture as a doctrine that starts from the description and analysis of reality as it is, but does not exclude the critique of social realities from the existing paradoxes and contrasting elements. It uses these elements and their deep patterns of structural change as necessary evidence and tools for any reform proposal. In Roy Bhaskar's (1975, 1993) ontology, realism in the social sciences refers to the existence of social relations that dictate the structure of society and the behavior of individuals within it.

The social sciences can study causal mechanisms as fundamental elements of society. However, their complexity and the difficulty of observing and isolating them can make their study ineffective and controversial, as these mechanisms may not always be activated, or be activated but not perceived. Difficulty in perceiving and observing complex causal mechanisms can lead to scientific misrepresentations, inability to study important connections, and erroneous predictions. However, the inability to understand and observe postulated mechanisms does not equate to their absence but may signal a temporary latency or absence.

Critical realism pursues a strategy of analytical dualism in which a separation is created between the individual and the structure to allow the study of the interaction between them (Archer, 1995). While the deductivism and formalism of traditional social thought are criticised, critical realism embraces a constructivist perspective on social change that founds a new social ontology based on the interaction between human action and social structure (Bhaskar, 1975; Lawson, 1997). The ontology of critical realism is compatible with an understanding of utopias in social thought that starts from socially paradoxical facts.

Critical realism studies both individual freedom within social structures and the constraints imposed by these on individual behavior. It is recognized that social structures decisively influence individual agency, as social change involves social structures and individuals in processes of flux and change. Change plays a crucial role

in social evolution, since individuals and social groups can self-consciously reflect on social change and exercise it through collective action (Bhaskar, 1975, 1993; Collier, 2011).

2.2. Complexity theory and social systems theory

Social change is complex. Complexity science has progressed in recent decades from physics and then penetrated biology, psychology and the social sciences (Prigogine & Stengers, 1984). In the social sciences, complexity theory has strongly intersected with social systems theory. Both approaches share a similar understanding of social process and structure, abandoning traditional orthodox social theorizing and imagining emergence, non-linear dynamics, functionalism and constructivism as the most typical modes of societal development (von Bertalanffy, 1968, 1972; Luhmann, 1995, 2018). These scientific approaches to the study of society allow utopian thinking to be integrated into broader contemporary science (Warren et al., 1998; Turner & Baker, 2019; Byrne & Callaghan, 2022).

2.2.1. Complexity theory

Complexity theory deals with the behavior of complex systems whose components interact in multiple ways and follow local rules, resulting in nonlinearity, collective dynamics, hierarchy, adaptation, and emergence. The parts of the system interact with each other in non-linear ways, leading to the emergence of more complex structures and phenomena at the level of the social system as a whole, its subsystems (e.g. the economic system as part of the social system and the social economy as a subsystem of the economic system) and in its interaction with other systems (Luhmann, 1995; Manson, 2001; Turner & Baker, 2019).

Since social systems exhibit non-linear developmental trajectories, small changes can lead to disproportionate effects or even phase shifts. This implies that small political or cultural changes can have significant and sometimes unexpected repercussions on social evolution, leading to social changes and the emergence of new social processes and structures in the medium to long term. Moreover, the self-organizing capacity of systems, where patterns emerge from the interaction between agents without centralized control, can mean that social problems can be addressed and solved collaboratively through social interaction and collective action (Condorelli, 2016).

Complex systems are adaptive and resilient, able to respond to change and disruption, implying that contradictions and challenges can be effectively addressed by introducing new structural processes while at the same time maintaining a balance between the action of different parts of the system. Feedback loops of cumulative causation create system dynamics whereby individual behavior and social structures influence each other, resulting in processes of social change and emergence of novel structures at different layers. In some cases, observed outcomes represent solutions to problems

posed in the past by the unfolding of utopian thinking (Condorelli, 2016; Turner & Baker, 2019).

Since social-ecological systems are inherently dynamic metabolic entities, they interact and exchange with the external environment, both natural and artificial, including the institutional environment. Referring to autopoiesis as dissipation, change is considered an intrinsic property of complex social systems (van der Leeuw, 2019; Byrne & Callaghan, 2022). The concept of autopoiesis refers to the self-production of social norms, working rules and coordination mechanisms (e.g. governance structures and organizations). Dissipative structures tend to eliminate entropy, i.e. the tendency of social systems to return to the original chaos and free unrestrained energy, which is transformed into stable social structure (Prigogine & Stengers, 1984; Flaherty, 2019).

2.2.2. Social Systems Theory

Social systems theory (SST), on the other hand, focuses on the interrelations and interconnectedness of various components of a society, which are identified as its subsystems. Society is understood as a complex system of multiple sub-systems, such as the economic, political, judicial, social media and communication technologies, etc. The environment, on the other hand, is external to the social system and represents the natural container or biosphere, within which the biological, psychic and social system emerged. The biosphere, of course, is itself part of the physical world (Turner & Baker, 2019; Byrne & Callaghan, 2022).

Social systems theory is strictly associated with the study of complex systems. SST studies non-ergodic social processes in which emergence is driven by complex feedback effects, path dependence, non-linearity, deep interconnectedness, and resonance. In other words, SST studies autopoietic processes of social emergence and change (Portugali, 2012). SST has its roots in the general systems theory that von Bertalanffy (1968) published in the 1930s. SST and complexity theory taken together can help to understand the characteristics of social structures of all kinds, which are “the result of human action, but not the execution of any human design” (Ferguson, 1782), as they cannot be obtained simply by planning blueprints. Self-organised emergent social change can refer to utopias when there are specific or general desirable social goals or conditions that have not yet been achieved, but may be achievable when the right conditions are in place.

SST is a description of reality that can adopt both the realist connotations of von Bertalanffy (1968) and the self-referential and constructivist stance of Luhmann (1995). Whereas in von Bertalanffy social systems are open in their homeostatic equilibrium with the external environment, due to continuous interaction and exchange, which also defines the evolutionary pattern of their internal structure, in Luhmann the system is an autopoietic closed process. Luhmann's approach describes a process of system emergence through complexity reduction and differentiation in relation to the external environment. The reduction of external complexity allows

the system to create its own internal complexity through an autopoietic process of recursive internal communication. Recursion is equivalent to the ability of the system to reproduce itself over time. Without closure and recursion, the system could not differentiate itself from the external environment and would cease to exist (Maturana & Varela, 1980; Hodgson, 2003a; Fuchs & Hofkirchner, 2010; Valentinov, 2014).

Autopoiesis is the self-referential and self-producing process of emergence and development of the system, which grows organically through complexity reduction and differentiation from the external environment (Maturana & Varela, 1980; Luhmann, 2006; Fuchs & Hofkirchner, 2010). On the other hand, the autopoietic creation of internal complexity through internal communication (e.g. the creation of organizational routines) is intended to fulfill the social function of the system. The self-referential nature of system development implies that systems can come into conflict with the external social and natural environment, as when the economic system exceeds the carrying capacity of the natural environment and causes excessive depletion of natural resources, dangerous pollution, destruction of virgin forests and extinction of animal species (Luhmann, 1989; Wackernagel, 1994). By the same token, internal conflict between the system's functions and structure can usher into structural reform and social change that require the creation of new social structures that were previously considered utopian, as when democratic states create parliaments and governments elected by the people (Luhmann, 2006). Change can be both progressive and regressive, depending on the social forces, cultures, and goals at play. The envisioning of progressive change requires that dysfunctional structures are overcome through open processes that set positive targets of social betterment.

Small changes in subsystem dynamics can affect the overall stability, adaptability and functionality of the system since, from a normative point of view, complexity theory and SST offer insights into the intricate interactions between the various subsystems of a society. Through non-linear evolutionary pathways, new social trends once considered utopian may be able to develop on their terms, creating new norms, values, communication channels and social props (e.g. organizations) to build new cultures which, in turn, may contribute to the self-maintenance and differentiation of the new emerging trends and structures (Brinsmead & Hooker, 2011; Schneider, 2012).

SST can play a discriminating role in identifying good utopias and avoiding bad ones, as the study of complex social systems can help to understand why some changes are achievable and desirable, while others are unlikely to occur and may be undesirable (Tortia, 2022; Sacchetti & Tortia, 2024). For example, SST can help to understand why the social economy has been emerging as a third dominant economic sub-system that is developing side by side with the traditional ones, private market capitalism and the public economy.

3. A new framework for assessing utopias

Based on these premises, a new framework for evaluating utopias can be proposed. The framework initiates an assessment path, as not all utopias provide relevant or interesting insights into possible developments in social evolution. It is not possible to make exact assessments of utopias as progressive and regressive statements about future social realities since future events cannot be predicted in advance with any degree of precision. Utopias can only be prefigured in qualitative terms but may contain important intuitions and normative statements about social change (emergence and continuation) of future social phenomena. Such claims of political and social philosophy may be worthy of consideration when properly evaluated in terms of their realism and when they are also compatible with and supported by the most valuable advances in the science of society. The fundamental principles of social change can be summarised in the following propositions:

(i) *Emergence of new social models of reform*. Social paradoxes, contradictions and anomalies need social innovation and reform to be resolved or improved. As a rule, social innovation in the form of new cultures, social processes and new organisational forms can be expected to lead to the desired social improvement;

(ii) *Progressiveness or prospective character of social reform*. The process of social change is oriented towards the production of new cultures, social structures (institutions and organizations) and innovations, rather than reproducing structures and cultures that already existed in the past, under the assumption that past cultures and structures would be characterized by the same contradictions and inconsistencies that led to their demise;

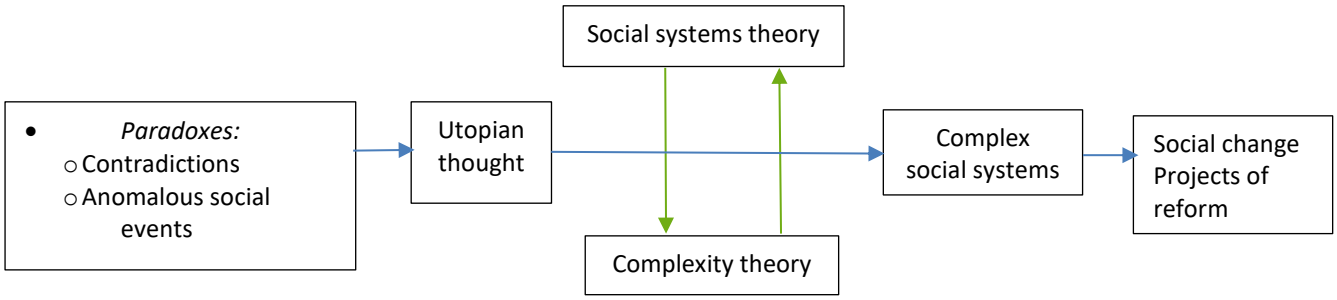
(iii) *Universality*. Social innovations and reform programs can be applied to any social context, individuals and social groups, although this is not necessary. One need only think of civil rights and liberties in Rawls' 1971 theory of justice as fairness. Restricting social reforms to specific social contexts and groups of people may point to forms of separation, segregation and conflict that would be perpetuated by the reforms. Such reforms would violate the universalist logic of utopian thought and civil rights.

(iv) *Contradictions lead to opposing outcomes*. These outcomes can have both positive and negative social implications. A well-known contradiction in the sectors populated by social economy organizations is the inability of for-profit entities to deliver high-quality relational goods, due to their tendency to exploit asymmetric information in their favor and against the welfare of users to reduce costs and increase net earnings (Hansmann, 1980, 1996).

Figure 1 shows that the detection of anomalies, contradictions and paradoxical facts in the social sphere can trigger a search process aimed at elaborating projects of social economic or political improvement or reform, which in many cases fall into the utopian sphere, at least in their initial stages. Realism is used as a criterion to verify

that what is being studied corresponds to the deep structures of social realities, for example, institutional structures, or other deep cultural elements, and not simply to apparent, ideological or temporary epiphenomena. Critical realism allows or even demands that the deep structures of society change over time, in directions that can be discussed and foreshadowed, but not accurately predicted except in qualitative terms. Complexity theory and social systems theory, especially in their more constructivist versions, allow for a deeper understanding of how the system has been changing and may continue to change over time through processes of self-organization and emergence (autopoiesis).

Figure 1. The unfolding of utopian thinking from social paradoxes to social change and projects of reform



3.1. An application to the social economy

Applying this framework to the social economy requires the exploration of utopian thinking through the lens of complexity theory in the social sciences and the study of social systems (Manson, 2001; Turner & Baker, 2019). Combining the above-mentioned concepts involves viewing social economy organizations as complex, hybrid adaptive systems characterized by outcomes that must be both economically and socially sustainable, resulting in a high degree of interdependence and a large number of nonlinear interactions (Pahl, Scholz-Wäckerle & Schröter, 2023). In the social economy, governance structures needs to be adaptive structures and organizations must be flexible and resilient enough to absorb such continuous or sudden disturbances from within or outside the social system (Tortia & Troisi, 2021; Tortia, 2024a, 2024b). In this respect, continuous or discontinuous adaptation, social entities, such as communities or social economies, can self-organize without centralized control. This principle aligns with utopian visions of decentralized and self-regulating societies.

Utopian thought that concerns the social economy may reflect an idealized vision of human society in which equity and fairness are maximized, as in Rawls approach to justice as fairness, and in his realistic utopia of The Law of Peoples (Rawls, 1971, 1999;

Hedrén, 2014; Tortia, 2024b). Cooperation and collaboration through collective action and the pursuit of social goals are taken as the norm in social action to meet the needs of individuals and groups, as opposed to competition in markets, and hierarchical social relations that characterize orthodox economic and social theorizing (Goodwin & Taylor, 1982; Levitas, 2013).

Social economy organizations, especially cooperatives, social enterprises and non-profit organizations, aim to share resources fairly and achieve an equitable distribution of economic and non-economic benefits. Economic decisions are made collaboratively among communities and organizations, rather than through hierarchical control. Flat hierarchies based on inclusiveness imply that power is distributed evenly, with collaborative decision-making and collective ownership, thus reducing the risk of marginalization and exploitation of weak social groups (Moulaert & Ailenei, 2005; Walby; 2007; Amin, 2009). However, complexity theory suggests that these economic sub-systems could encounter unpredictable dynamics, resource allocation problems and other negative unintended inequalities. Therefore, given their hybrid nature, social economy organizations need to achieve economic and social sustainability (Spear, 2011).

4. Discussion and conclusions

This work should enhance the understanding of utopias as pathways to better knowledge and practice of the evolution of social systems in terms of progressive, social and political reform. This would support the compatibility of future outcomes and structures with what already exists today, pointing out the qualitative characteristics of social processes, leading from the current situation to future scenarios and outcomes. To evaluate the evolution of culture and social structures in progressive terms, new theoretical criteria are needed, which have been found in critical realism, social systems theory and complexity theory. The danger and shortcomings of restricting and reducing the analysis to standard assumptions concerning human rationality, and individual behavior in the functioning of the social and economic system (e.g., the dominance of the paradigm of perfect markets and contracts) has been highlighted (Büchs & Koch, 2019).

It has been argued that regressive utopias tend to pertain to past events, social orders, and ideologies. To the extent that regressive utopias tend to reproduce past events and mix them with present realities, they may be realistic, but not progressive, and are not compatible with non-contradictory and non-exclusionary changes in human societies. On the other hand, positive and progressive utopias are more closely related to new emerging features of society that may be suitable for overcoming contradictions and paradoxical outcomes. They can improve social relations and institutions in terms of inclusiveness, fairness and universality. Their epistemological foundations lie in social complexity, which directs the emergent properties of new social orders.

The uncertain nature of positive utopias makes them more prone to error and misunderstanding than negative ones. They may require decades or centuries of processes of evolution and social adaptation to be carried out, even partially, as in the case of the formation of unitary political entities in medieval Europe, or the spread and predominance of democratic political regimes in the West. Hence, progressive utopias need clearer evaluative criteria in terms of realism and realisability. Their acceptance at the political level may be much slower than regressive utopias due to their uncertain and difficult-to-understand and -predict character. The complexity and trial-and-error nature of social evolution may entail significant setbacks and detours due to the difficulty of demonstrating their practical relevance, positive outcomes, and applicability.

The social economy and the organizational types that populate it have been taken as prime example of the application of utopian thinking, precisely because they emerged historically as a forceful attempt to overcome some of the major contradictions and anomalies of capitalist market societies, especially in terms of their negative economic, social and environmental impacts. The attempt to introduce new non-profit organizational forms, to induce social innovation and to govern social processes in more equitable and inclusive ways gave rise to several new social phenomena, such as social movements, third sector organization and the cooperative economy. The emergence of the social economy has demonstrated that utopian thinking is not without meaning, reforming potential and positive outcomes when coupled with realism in its potential application, as grounded in the actual conditions of society and human nature, and evaluated using rigorous criteria of analysis that correspond to the complexity of evolving social systems.

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