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**RIVALRY AND COOPERATION
BETWEEN STATES: ECONOMIC
AND CULTURAL ASPECTS
(BASED ON THE STUDIES OF I.
WALLERSTEIN AND
R. INGLEHART)**

The article shortly summarizes the world-system theory of Immanuel Wallerstein and the evolutionary modernization theory of Ronald Inglehart, and investigates the applicability of the latter for the international relations. It is claimed that a synthesis of both theories is possible. The implications of such an approach are presented in the conclusions.

Key words: world-system, values, economic security, international relations.

Introduction. This article is aimed at the study of two significant concepts in political science belonged to Immanuel Wallerstein and Ronald Inglehart, and their adaptation to international relations. It will contribute to global processes analysis and clearer characteristics of states' interaction from several perspectives. We believe that a view of the issue from different angles such as economics and culture let scientists consider numerous aspects of international affairs simultaneously, giving an opportunity to explain them lucidly. And as one theory often complements or contradicts another, we attempt to widen these two political concepts by means of investigating their common ground and implementing them together for possible further synthesis.

Also, since Wallerstein's studies are less known in Ukraine and Inglehart's works are not usually practiced in the international relations field, there is a need to introduce

their major theories and apply them to the interpretation of collaboration and rivalry between states. This disciplinary connection will shape a complex appraisal of global cooperation and countries' motivation to develop, dominate and change, taking into account either economic background or cultural basis.

Sources. We decided to take the most prominent works of both authors for our analysis. For instance, in his monumental work *The Modern World-System*, I. Wallerstein firstly describes the idea of economic genesis of the modern world. We chose exactly Volume I for the article as it contains the basic information about Wallerstein's economic doctrine, which he develops in the following supplemented editions. Yet we refer to his *World-Systems Analysis: An Introduction* and *The Essential Wallerstein*, which has a few essays linked with international topics and correlated with the cultural model of R. Inglehart. As for him, we use the major works *The Silent Revolution*, *Cultural Evolution* and *Modernization, Cultural Change, and Democracy*, where he explains his cross-national value change theory. In addition, *Modernization, Cultural Change and the Persistence of Traditional Values* and *Cultural Backlash* give a more valid overview of Inglehart's concept.

Immanuel M. Wallerstein (1930–2019) is a classic of modern political science, economic history and comparative sociology. Being an honorary Ph.D. of Columbia University, he also held positions as visiting professor at universities worldwide. His major studies are devoted to the *World-systems theory* (1974–2011), which explains the emergence and function of the global capitalist economy not only within regions but on a macroscopic level. Inspired by the works of K. Marx, he has developed the idea of natural dominance and transformed it into global politics with some minor modifications [7].

Thus, in *The Modern World-System* (1974) he adopted the concept of dependency due to unequal exchange and hence divided

the whole world into core countries, semi-periphery and periphery. According to him, unequal exchange is the result of the unjust historical process, started in the 'long' 16th century from Western Europe and expanded to cover the entire globe. Since that time there was a total economic change, transition from feudalism to capitalism and transformation of quantity into quality. For least developed societies these meant restricting access to necessary resources, so they could never reach the level of the core. Yet the most advanced states established a balance of power based on their economic potential and drove underdeveloped countries into the framework of the new world order [6].

Speaking in more detail, the world order of Wallerstein is fully controlled by a dominant capitalist center called '*core*'. It includes the most industrialized and technologically advanced countries, whose needs and demands are being satisfied by the rest of the world, often without taking into account the national interests of other regions. The global future also depends on the core's position and is decided in virtue of its economic concern. An opposite concept is '*periphery*' which encompasses less developed and undeveloped countries with almost no access to global wealth. Considered victims of the capitalist world-economy, they have not cultivated a military-industrial complex, succeeded in high technology and failed to maintain strong state institutions, such as educational or healthcare systems. As a result, periphery countries are mainly involved in agriculture and hardly exploited by great powers for their cheap labor and plenty natural resources. The middle position in the world economy belongs to '*semi-periphery*' located between the core and peripheral areas and connecting them internationally. These countries are usually described as industrializing and mostly developed with not enough technological, military or political potential to replace the core. Their main target is to dominate over the periphery and enjoy the wealth remained after core, yet to contend for its succession [5; 6; 7].

Probably the most obvious fact of the World-Systems Theory is a states' wish to shift from a lower rank to the top. And I. Wallerstein considers it almost impossible to change the position in the short-run due to a strong hierarchy in today's capitalist world. This historical system has not just a balance of power, but an established order with a single '*hegemonic power*' that is difficult to replace, its satellites '*junior partners*' or opponents '*rising powers*' and the rest of non-resisting world. Benefits are also distributed along this rigid vertical of power, passing the periphery and saturating the core. Although the scientist supposes the likelihood of such a global change in his essays [5], this idea has its complexity. Due to the cyclical pattern of the capitalist world-economy, it is not so stable; "being born, it has developed and will cease to exist one day" [5, p. 253]. Therefore, there are approximate time frames and conditions which allow changes inside the world order. And if the hegemon's reign lasts stably for about two centuries, radical changes are still possible in a few ways.

The first one is global crises that let the non-core states rise instantly and manifest itself in the absence of fierce competition at the moment. Another way is total world wars among major actors that cover a large part of population and last for 30-40 years, changing the balance of power drastically. The gradual weakening of the current hegemon also makes it likely to change the top, and usually a semi-periphery country from the list of its partners takes this place. Then, there is an alternative option for extensive development by carrying out reforms and strengthening the domestic economy in periphery states, but Prof. Wallerstein finds such a path to be dead-ended because of the cruelty of unequal exchange and the injustice of the current world-system.

Of course, this system affects international relations and, according to Immanuel Wallerstein, it is the only principle that drives contacts between states. Based on their economic interests, as well as to ensure promotion and protection for their capital, countries maintain relationships within the

modern hierarchy. In such economic conditions a state cannot separate from the entire world and function well at the same time; it needs interaction with other actors, even through rivalry and domination over weaker countries.

Ronald F. Inglehart (born 1934) is a political scientist from the University of Michigan. His studies dealt with the problems of value change. Since the early 1970s, he has developed a different set of questionnaires in order to examine what possible culture shifts may have taken place in the West at that period of time. The results of the statistical research performed on the basis of abovementioned questionnaires were published in his first major work *The Silent Revolution* (1977) [2] that soon became classics among the political scientists. The ideas presented in this book were further developed and laid the foundation for Inglehart's evolutionary modernization theory which was fully presented in his recent work *Cultural Evolution* (2018) [1] and which will be covered in this article a little later.

In *The Silent Revolution* Inglehart described two sets of values in the Western society that he called Materialistic and Post-Materialistic. Materialists were more concerned about good salary, job security, were more parochial, more religious and less open to innovation, and Post-Materialists, on the other hand, found to be more in favor of the feeling of accomplishment, the ability to have a good working environment, were more cosmopolitan, more secular and more open to innovation correspondingly. In between of those two polar values types there were a lot of people with mixed values, but the results of the opinion polls held in the beginning of 1970s showed strong prevalence of the Materialists over almost all other types of people. However, an interesting change was detected. At this point Inglehart noted: "What does seem new... is the quantitative incidence of the Post-Materialists: among the youngest cohorts they are nearly as numerous as the Materialists" [2, p. 67].

That was the revolution he was describing in his book. After a long period of

peace and prosperity in the Western world, another set of values started to develop. The idea, that up till nowadays continues to be a central theme for his research, stated that *value changes are mostly affected by the sense of economic security*. In the case of Western countries in 1970s high level of economic security resulted in the slow intergenerational shift from Materialistic to Post-Materialistic values [2].

After a while, the area of the opinion polls conducted by Inglehart was widened so that every new wave of surveys presented a greater number of countries and, as the time has passed, a larger quantity of data has become available [3; 4]. All this contributed to the improvement of the ideas described above. Presented partially in a variety of articles and in some of his books, the whole concept was summarized in *Cultural Evolution* and got the name *evolutionary modernization theory* [1]. In short, it is stated that (1) the development of societies is not linear, but probabilistic (meaning that the progress, or regress, is not predetermined, but a chosen path and that some paths are more probable than the others); (2) although every person tends to value freedom as the highest value, if the preceding physical needs (such as food, water, security, etc.) are not satisfied, the one will be looking to satisfy these exact needs, leaving his/her high aspirations for later; (3) the most important time for the formation of one's values is pre-adult years – after this period values are mostly stable and do not change overtime, if there are no disasters that can dramatically change the situation; (4) hence, value change takes place in the form of intergenerational shift that lasts around 40-50 years, when one generation will be completely replaced by the other; (5) finally, if one's economic security is relatively high for a long period of time, a flow towards Post-Materialism will start and if not – the flow will be reverted back to Materialism.

Having all this in mind, what are the consequences of these findings for the international relations? Although no clear explication has been made so far, we are to

propose one. After studying Inglehart's works, we think that preferences in foreign policy of any society are also shaped by the level of its economic security. Thus, the societies with low economic security are more likely to choose conflicting and selfish foreign policy which aim is to preserve its survival on the international arena. Conversely, the society with high level of economic security will mostly choose foreign policy that is aimed at community-building and will seek to propagate supranational solidarity and to promote international cooperation by the development of international institutions such as UN, WTO, World Bank etc.

Conclusions. We have presented two fairly wide theories that can explain how economics and culture affect the international relations. At the beginning of the article we have asked a question whether there is a place for a composed view without artificial division into several aspects. We suppose that the answer is affirmative and here are some combined implications:

Although the most developed countries have the ability to form global agenda, this agenda is not made at random. When the economic security of the societies from these countries was assured, a new world order started to develop. Concerns about human rights, worldwide poverty, fate of sexual and ethnic minorities begun to shape the environment in which international relations are performed. We should not forget that is a double-edged sword, so, as these societies have begun feeling their economic security threatened due to rising inequality, a reversed flow took place and resulted in Brexit, the surge of nationalistic movements in Western Europe and the election of Donald Trump in the USA.

Conflict between rich and poor states seems to be more complicated: different level of economic development created different cultures where the former values tolerance, freedom, equality and quintessence of those three – democracy; the latter, on the contrary, perceives these values as destructive and highly inappropriate for the survival of their community. For this reason, economic and

cultural aspects support each other and create some kind of vicious circle of misunderstanding that can be overcome only by strong intention for change and with the results can be seen only after 40–50 years of successful development.

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Конкуренція та співробітництво між державами: економічні та культурні аспекти (на основі досліджень І. Валлерстайна та Р. Інглехарта)

У статті коротко підсумовано світо-системну теорію Іммануїла Валлерстайна та теорію еволюційної модернізації

Рональда Інглегарта, досліджено можливість застосування останньої у царині міжнародних відносин.

Також заявлено про можливість поєднання обох теорій. Наслідки такого підходу розглянуті у висновках.

Ключові слова: *світ-система, цінності, економічна безпека, міжнародні відносини.*

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