

Synthesis of historical evolution of development theory and evolutionary futures and anticipation studies and their links

Research Director, Adjunct Professor, Professor, Dr Jari Kaivo-oja

Workshop “A1. Imagining post-pandemic futures in the Global South”

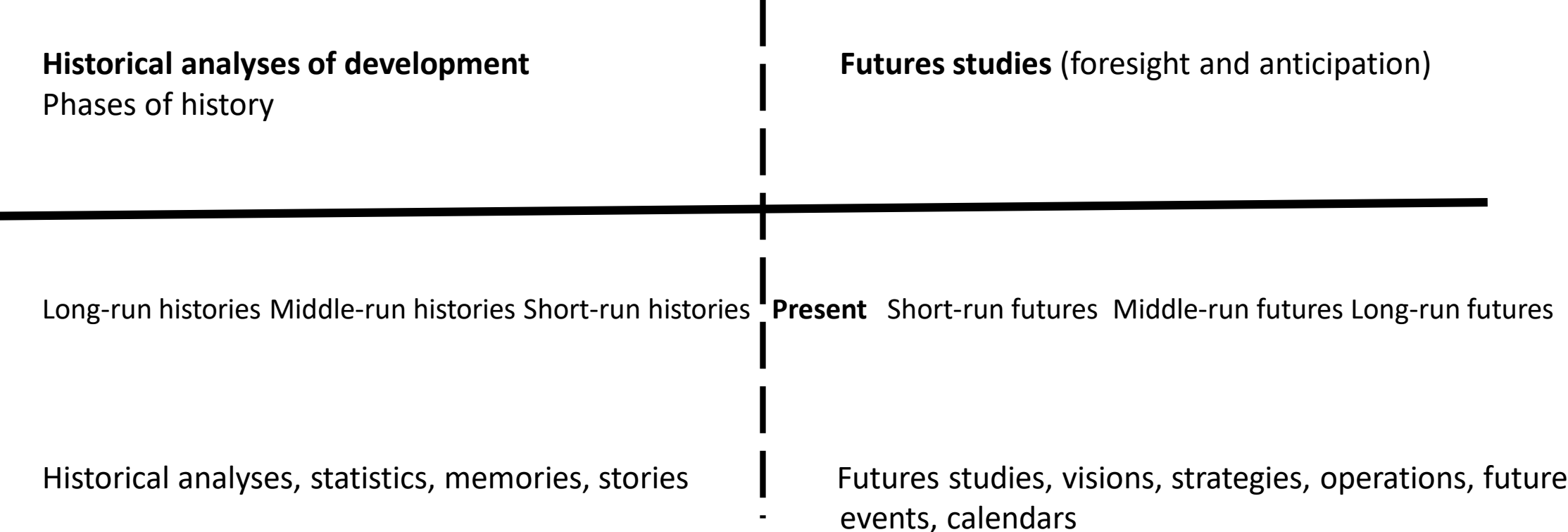
Monday 21.6.2021



“How has the COVID-19 pandemic affected the topic of your study, and its future?”

- COVID-19 pandemic has revealed many existing problems of poverty and social inclusion in the Global South
- Equity problems are showed clearly by COVID-19 cases and deaths (Kaivo-oja & Lauraéus 2021)
- Social inclusion mechanisms matter: employment, education, social patterns and structures
- Globalisation process may be reconsidered and the role of rural development needs more attention: population density is a critical resilience factor (especially housing of citizens and mobility of citizens)
- Used and applied control mechanism of COVID-19 crisis provide new insights especially through social distancing mechanisms

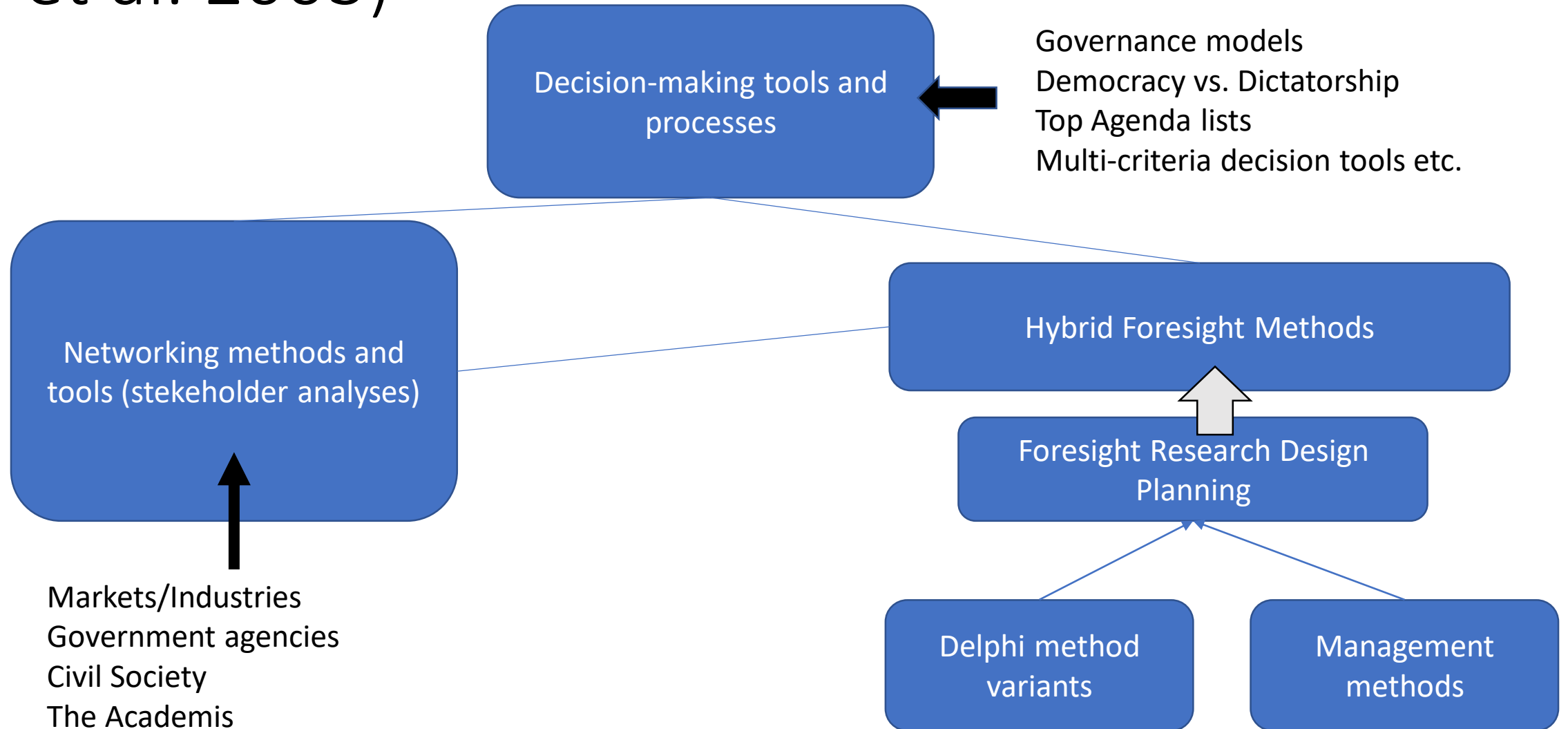
Time science: Historical development and futures: time is running



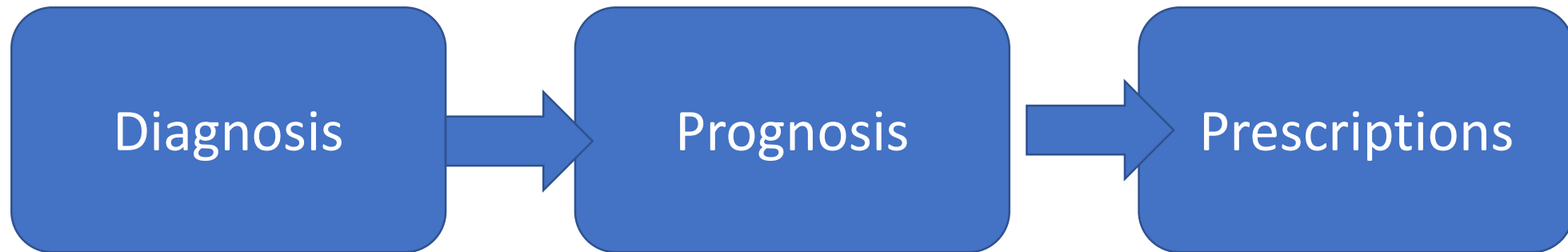
Three basic governance approaches: Three development scenarios

- "Government is a problem" => Neoliberal emphasis, free market economy is needed (Chicago School of Economics in Latin America)
- "Markets are a problem => Planning of economy, hierarchical corporate economy (China, Soviet Union)
- "Not either government or markets are a problem" => Mixed economy approach, Public-Private partnership emphasis (Nordic countries)
- There are many institutional variations of these three models

“Fully Fledged Foresight” –approach (Keenan et al. 2003)



Basic ForLearn foresight approach (For Learn 2021)



Development theories and futures-oriented approaches: Key approaches

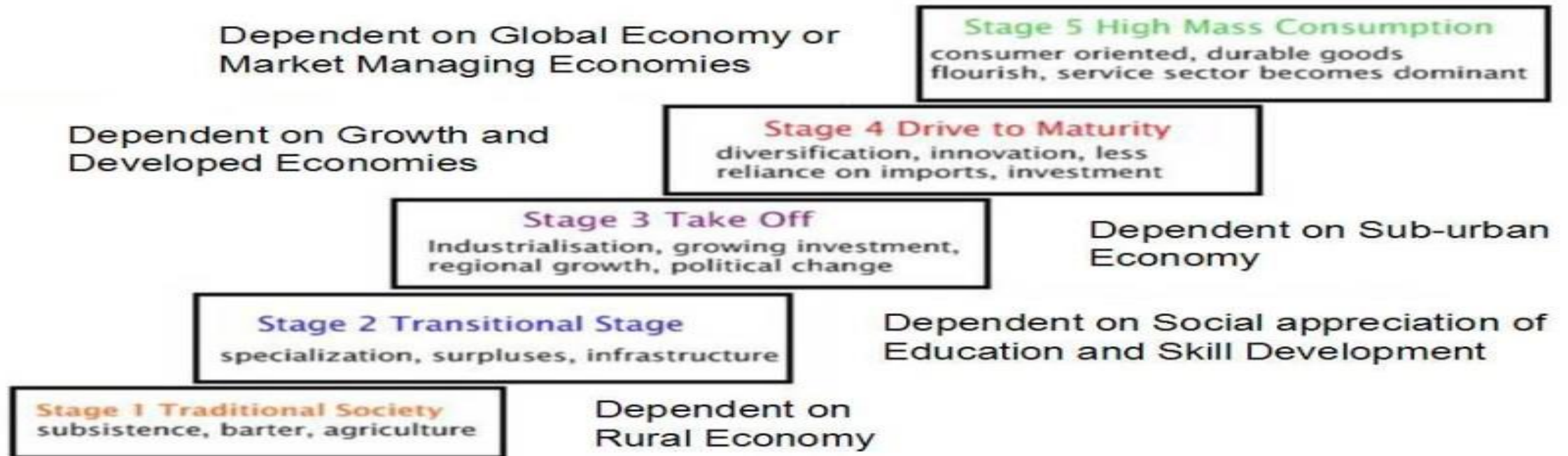
- Modernization theory
- Economic linear stages of growth
- Structuralism
- Dependency theory
- Basic needs theory
- Neoclassical theory, structural adjustment
- Social system theory of Niklas Luhmann and other system theorists (Wallerstein, Snowden, etc.).
- Human system development theory
- Key futures-oriented approaches are classical futures studies, foresight paradigm and anticipation research and studies.

Four dominating theories: Modernisation, Dependency, World system and Globalisation

- Reyes, Giovanni E. (2001) Four main theories of development: modernization, dependency, world-system, and globalization. *Nómadas. Revista Crítica de Ciencias Sociales y Jurídicas*, 04 (2001.2)
- Good to read : [37963-Texto del artículo-43126-1-10-20111213.pdf](#)
- “The major assumptions of the modernization theory of development basically are: Modernization is a phased process; for example Rostow has 5 phases according to his theory of economic development for a particular society, and I will mention them later. Modernization is a homogenizing process, in this sense, we can say that modernization produces tendencies toward convergence among societies, for example, Levy (1967, p. 207) maintains that : “as time goes on, they and we will increasingly resemble one another because the patterns of modernization are such that the more highly modernized societies become, the more they resemble one another”. (6) Modernization is a europeanization or americanization process; in the modernization literature, there is an attitude of complacency toward Western Europe and the United States. These nations are viewed as having unmatched economic prosperity and democratic stability (Tipps: 1976, 14). In addition, modernization is an irreversible process, once started modernization cannot be stopped. In other words, once third world countries come into contact with the West, they will not be able to resist the impetus toward modernization. Modernization is a progressive process which in the long run is not only inevitable but desirable. According to Coleman, modernized political systems have a higher capacity to deal with the function of national identity, legitimacy, penetration, participation, and distribution than traditional political systems. Finally, modernization is a lengthy process. It is an evolutionary change, not a revolutionary one. It will take generations or even centuries to complete, and its profound impact will be felt only through time. All these assumptions are derived from European and American evolutionary theory.” - Reyes 2001)

Rostow's 5 stages of growth

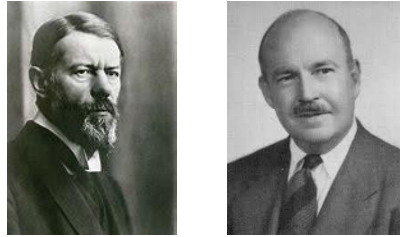
Rostow's 5 Stages of growth



Demographic research requirement using Rostow's model prior to Product Launch

Dr. Krishnan Umachandran

Modernisation theory: Traditional Weber-Parsons approach



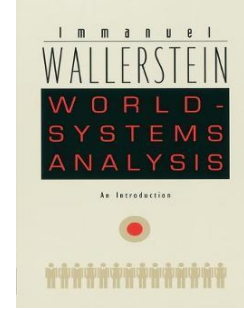
- Modernization refers to a model of a progressive transition from a 'pre-modern' or traditional to a 'modern' society. Modernization theory originated from the ideas of German sociologist Max Weber (1864–1920), which provided the basis for the modernization paradigm developed by Harvard sociologist Talcott Parsons (1902–1979). The theory looks at the internal factors of a country while assuming that with assistance, "traditional" countries can be brought to development in the same manner more developed countries have been. Modernization theory was a dominant paradigm in the social sciences in the 1950s and 1960s, then went into a deep eclipse. It made a comeback after 1991 but remains a controversial model.
- Modernization theory both attempts to identify the social variables that contribute to social progress and development of societies and seeks to explain the process of social evolution. Modernization theory is subject to criticism originating among socialist and free-market ideologies, world-systems theorists, globalisation theorists and dependency theorists among others. **Modernization theory stresses not only the process of change but also the responses to that change.** It also looks at internal dynamics while referring to social and cultural structures and the adaptation of new technologies.
- Modernization theory suggests that traditional societies will develop as **they adopt more modern practices.** Proponents of modernization theory claim that modern states are wealthier and more powerful and that their citizens are freer to enjoy a higher standard of living.
- Traditional religious beliefs and cultural traits, according to the theory, usually become less important as modernization takes hold.

New modernization approach

- Today, the concept of modernization is understood in three different meanings: (1) as the internal development of Western Europe and North America relating to the European New Era, (2) as a process by which countries that do not belong to the first group of countries, aim to catch up with them, (3) as processes of evolutionary development of the most modernized societies (Western Europe and North America), i.e. modernization as a permanent process, carried out through reform and innovation, which today means a transition to a postindustrial society. Historians link modernization to the processes of **urbanisation and industrialization and the spread of education.**

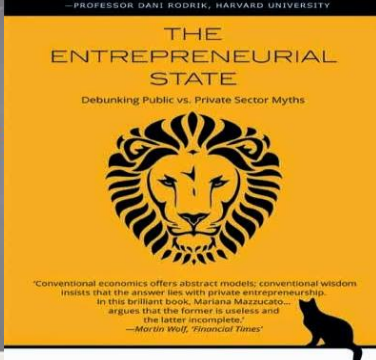
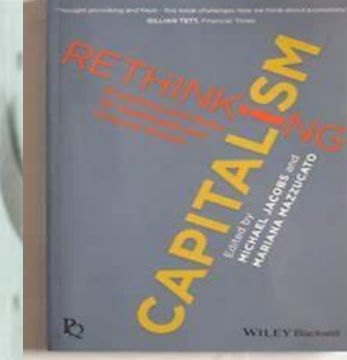


World-systems theory and theorists

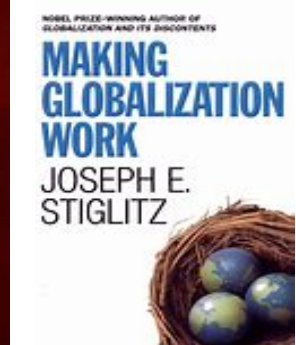
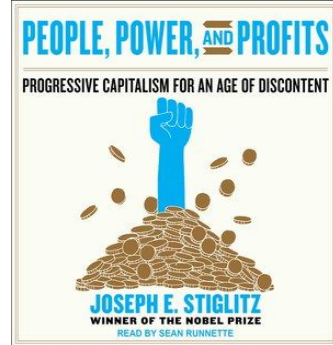


Immanuel Wallerstein

- World-systems theory (also known as world-systems analysis or the world-systems perspective) is a multidisciplinary approach to world history and social changes which emphasizes the world-system (and not nation states) as the primary (but not exclusive) unit of social analysis.[1] ***"World-system" refers to the inter-regional and transnational division of labor, which divides the world into core countries, semi-periphery countries, and the periphery countries, [2] Core countries focus on higher skill, capital-intensive production, and the rest of the world focuses on low-skill, labor-intensive production and extraction of raw materials.[3] This constantly reinforces the dominance of the core countries.***
- Nonetheless, the system has dynamic characteristics, in part as a result of revolutions in transport technology, and individual states can gain or lose their core (semi-periphery, periphery) status over time. This structure is unified by **the division of labour**. It is a world-economy rooted in a capitalist economy. For a time, **certain countries become the world hegemon**; during the last few centuries, as the world-system has extended geographically and intensified economically, this status has passed from the Netherlands, to the United Kingdom and (most recently) to the United States.
- World-systems theory has been examined by many political theorists and sociologists to **explain the reasons for the rise and fall of states, income inequality, social unrest, and imperialism.**



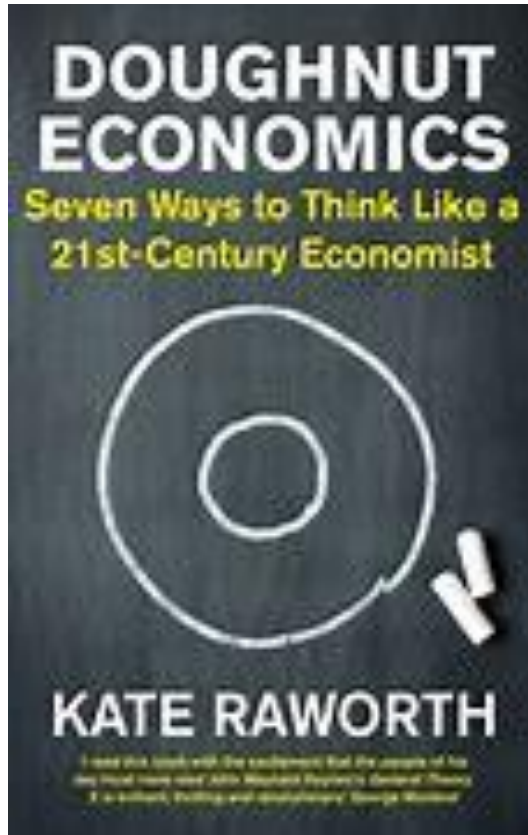
MARIANA MAZZUCATO
"One of the Most Important Thinkers about Innovation", *New Republic*



Globalisation theorists

- Globalization can be defined as ***the integration of economic, political and social cultures***. It is argued that globalization is related to **the spreading of modernization across borders**.
- ***Global trade*** has grown continuously since the European discovery of new continents in the Early modern period; it increased particularly as a result of the Industrial Revolution and the mid-20th century adoption of the shipping container.
- ***Annual trans-border tourist arrivals*** rose to 456 million by 1990 and almost tripled since, reaching a total of over 1.2 billion in 2016.[9][10] Communication is another major area that has grown due to modernization. Communication industries have enabled capitalism to spread throughout the world. Telephony, television broadcasts, news services and online service providers have played a crucial part in globalization. Former U.S president Lyndon B. Johnson was a supporter of the modernization theory and believed that television had potential to provide educational tools in development
- With the many apparent positive attributes to globalization there are also ***negative consequences***. The dominant, neoliberal model of globalization often increases disparities between a society's rich and its poor.[12][citation needed] In major cities of developing countries there exist pockets where technologies of the modernised world, computers, cell phones and satellite television, exist alongside stark poverty.
- Globalists are globalization modernization theorists and argue that globalization is positive for everyone, as its benefits must eventually extend to all members of society, including vulnerable groups such as women and children.

Sustainable development and the doughnut economy



Dependency theorists



Prof. Samir Amin in the middle of group photo

- One alternative model on the left is Dependency theory. It emerged in the 1950s and argues that the underdevelopment of poor nations in the Third World derived **from systematic imperial and neo-colonial exploitation of raw materials**. Its proponents argue that resources typically flow from a "periphery" of poor and underdeveloped states to a "core" of wealthy states, enriching the latter at the expense of the former. It is a central contention of dependency theorists such as Andre Gunder Frank that poor states are impoverished and rich ones enriched by the way poor states are integrated into the "world system".
- **Dependency models arose from a growing association of southern hemisphere nationalists (from Latin America and Africa) and Marxists.** It was their reaction against modernization theory, which held that all societies progress through similar stages of development, that today's underdeveloped areas are thus in a similar situation to that of today's developed areas at some time in the past, and that, therefore, the task of helping the underdeveloped areas out of poverty is to accelerate them along this supposed common path of development, by various means such as investment, technology transfers, and closer integration into the world market. Dependency theory rejected this view, arguing that underdeveloped countries are not merely primitive versions of developed countries, but have unique features and structures of their own; and, importantly, are in the situation of being the weaker members in a world market economy.

Dependency theory: core and periphery relations



From a largely Weberian perspective, *Fernando Henrique Cardoso* described the main tenets of dependency theory as follows:

- There is a **financial and technological penetration of the periphery and semi-periphery countries by the developed capitalist core countries.**
- That produces an **unbalanced economic structure** within the peripheral societies and between them and the central countries.
- That leads to **limitations upon self-sustained growth in the periphery.**
- That helps **the appearance of specific patterns of class relations.**
- They require modifications in the role of the state to guarantee the functioning of the economy and the political articulation of a society, which contains, within itself, foci of inarticulateness and structural imbalance.
- Dependency and world system theory propose that the poverty and backwardness of poor countries are caused by their peripheral position in the international division of labor. **Since the capitalist world system evolved, the distinction between the central and the peripheral states has grown and diverged.** In recognizing a tripartite pattern in division of labor, world-systems analysis criticized dependency theory with its bimodal system of only cores and peripheries.

Dependency theory paradigm: ECLAC proposal of Prebisch (1950, United Nations)

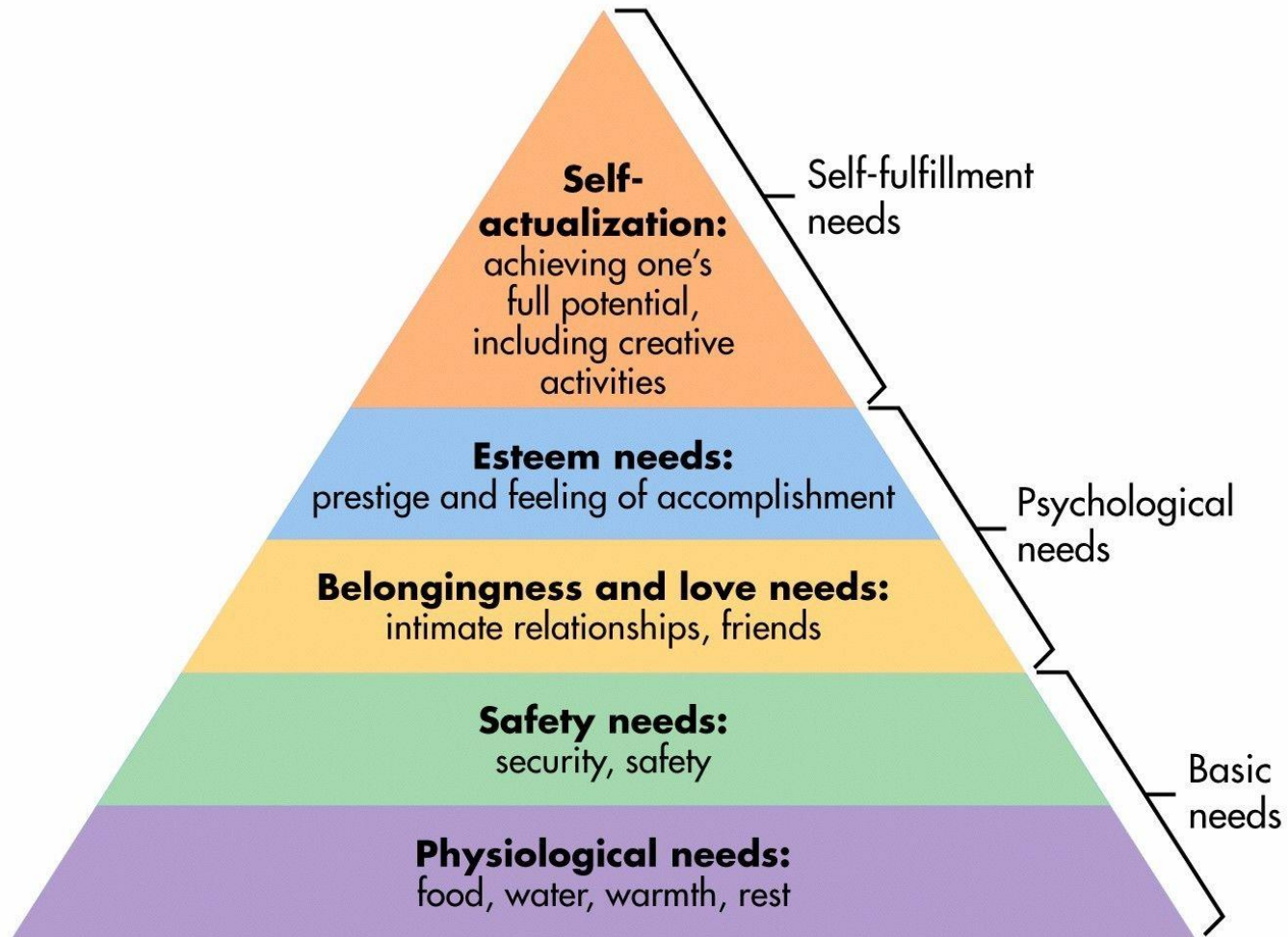


One of the most representative authors was Raul Prebisch. The principal points of the Prebisch dependency model are that in order to create conditions of development within a country, it is necessary:

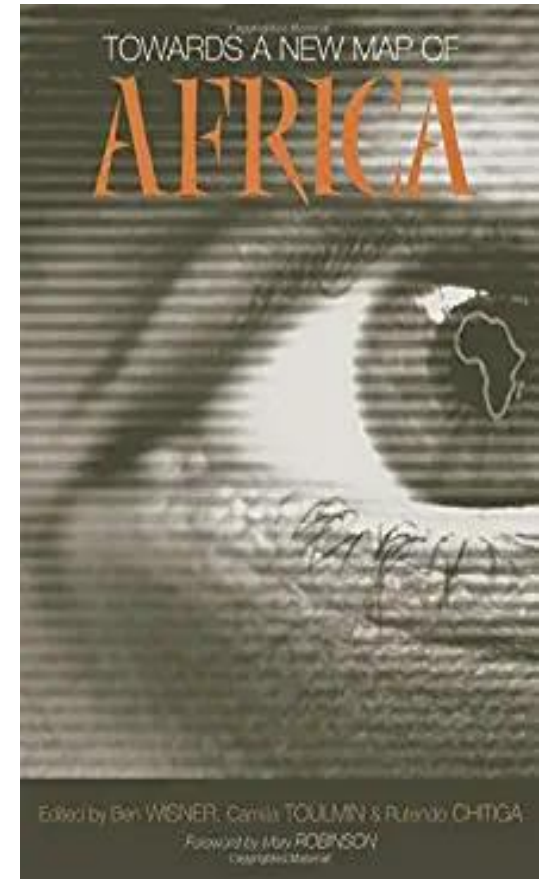
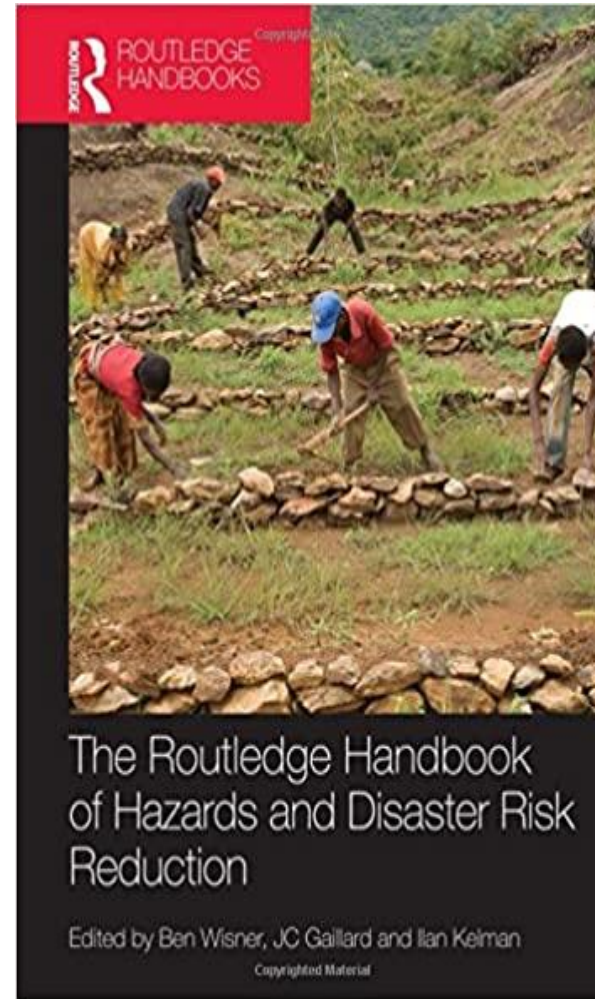
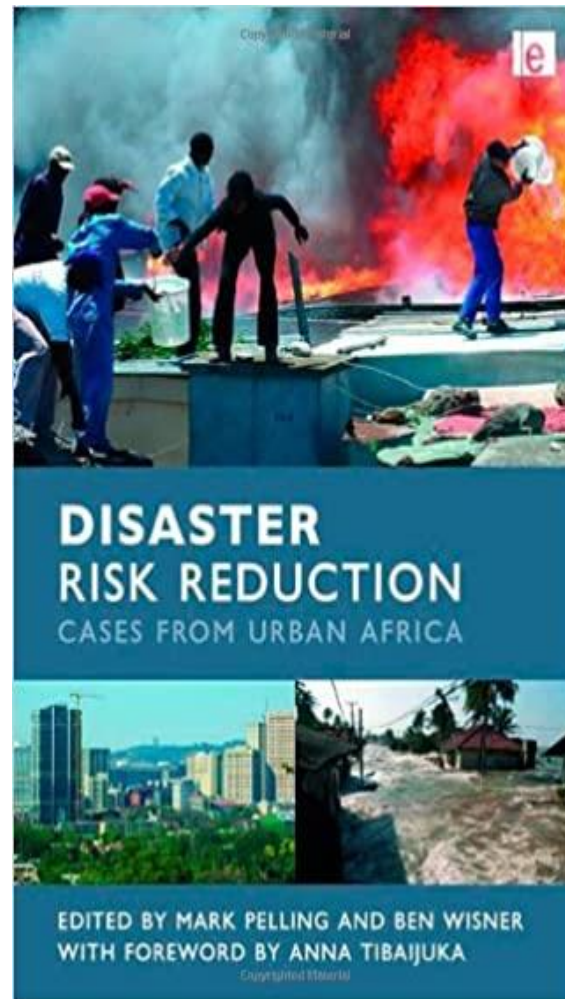
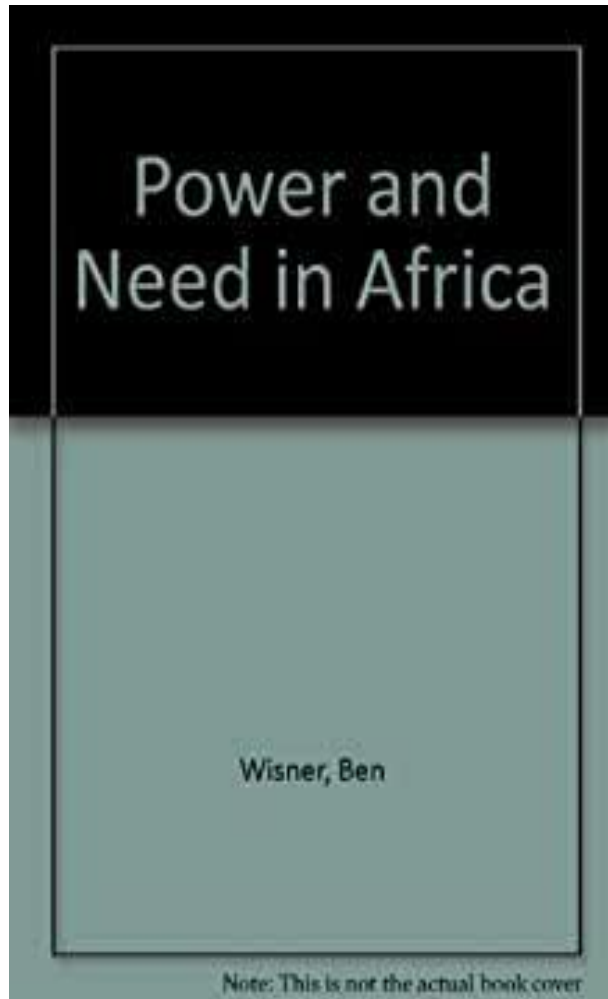
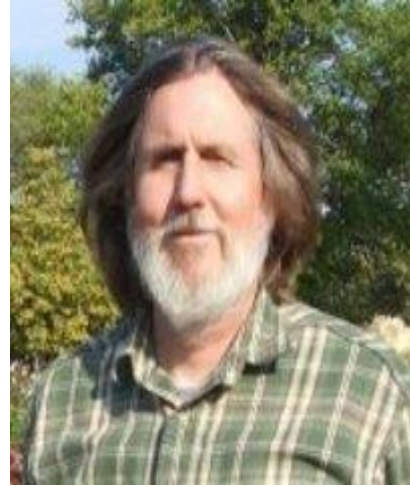
- a) To control the monetary exchange rate, placing more governmental emphasis on fiscal rather than monetary policy;
- b) To promote a more effective governmental role in terms of national development;
- c) To create a platform of investments, giving a preferential role to national capitals
- d) To allow the entrance of external capital following priorities already established in national plans for development;
- e) To promote a more effective internal demand in terms of domestic markets as a base to reinforce the industrialization process in Latin America;
- f) To generate a larger internal demand by increasing the wages and salaries of workers, which will in turn positively affect aggregate demand in internal markets;
- g) To develop a more effective coverage of social services from the government, especially to impoverished sectors in order to create conditions for those sectors to become more competitive; and
- h) To develop national strategies according to the model of import substitution, protecting national production by establishing quotas and tariffs on external markets.

The Prebisch and ECLAC's proposal were the basis for dependency theory at the beginning of the 1950s

Basic needs theory: Variations Abraham Maslow



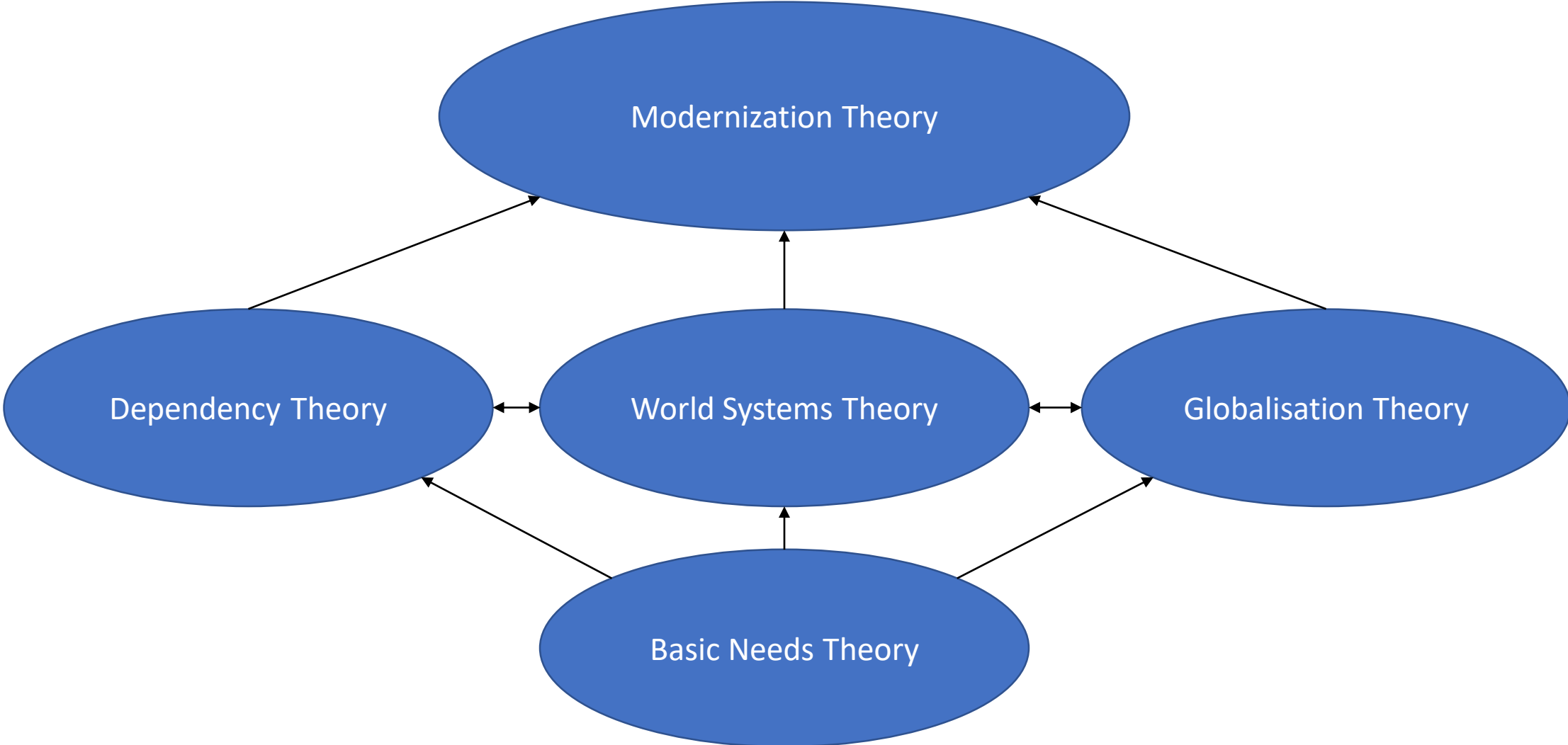
An good example of basic needs theory developer: Dr Ben Wisner



Key visions based development theories

- Basic modernisation vision: "Extensive modernization of the world reaching mass consumption" (Modernization theory)
- "Eliminate harmful networks and barriers of dependency" (Dependency theory)
- "Make world function nicely and in a sustainable ways on the basis of system theoretical thinking" (World systems theory)
- "Make countries and regions to be fully globalized and integrated" (Globalisation theory)
- "Make people to reach fullself-actualisation and self-fulfillment" (Basic needs theory)

Towards synthesis



Thank you for your attention!

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