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A Genealogy of Sociological Theories— An Attempt at General Reflection

Abstract: This article attempts to show the asymmetry in the framework of theoretical sociology. This asymmetry concerns the unambiguous domination of Western sociological theoretical systems over theoretical systems from outside the West's boundaries. We have in mind here the intellectual domination of representatives of countries of the North over countries of the South. It may be agreed simultaneously that such an asymmetry is acceptable and reasonable, and that it is unjust to ascribe unique truth and appropriateness to the theories of the North in explaining all the phenomena of the whole world—North and South alike. Thus in this article we present, in the historical perspective, selected sociological theories—in our opinion the most important ones—which confirm the validity of the domination of sociological theories of Europe and North America. We reach back to the first sociological systems of, among others, Auguste Comte, Herbert Spencer, Émile Durkheim, and Max Weber, and the theories of social development. These latter are important in that it is precisely within their framework that two kinds of theories emerged with clear input from scholars of the South: dependency theory and endogenous theories of social development.

Keywords: sociological systems and theories, world as North and South, modernizing development, dependent development, theories of endogenous development

Prolegomena

A few years ago we came across a book by Raewyn Connell, *Southern Theory: The Global Dynamics of Knowledge in Social Science* (2007), which addresses the question of social life from a different perspective than the North world. In Connell's opinion, theoretical sociology has been, and still is, dominated by scholars from this part of the globe. At the same time, analysis of the contemporary world's problems, which are mired in global processes, requires a holistic view, and thus a look at sociological theories that emerged outside of Europe and North America. In attempting to include Southern theories—as Connell defines theories that have developed in the South, outside of Western thought—we have to be conscious that, from the beginning, social concepts and theories have appeared in the northern part of the globe, which is universally acknowledged to be richer and better developed. This civilizational and economic primacy combines with the intellectual domination from which many theoreticians and analysts have described the transformation occurring in the South.

The North-South dichotomy appeared in the 1960s, displaying the division of the world into the industrialized, mostly rich North and the poor, largely farming South, occupying, roughly, Africa, Asia, and Latin America.¹ The real and clear differences in the levels of economic development between Europe and Africa, or the United States and Canada contrasted with Latin America, legitimized the use of the terms North and South to name the highly developed world on the one side, and on the other, a world that was for the most part—undeveloped. This distinction was made fairly often in appraising the scholarship of representatives of the two worlds. Within the social sciences in the broad sense, including sociology, we refer very often, as is natural, to such names as Emile Durkheim, Max Weber, or Talcott Parsons, and with unusual rarity to scholars from South regions of the world. Their work, is qualitative and valuable in the academic world. It is entirely obvious that the paradigmatic views—to use Thomas Samuel Kuhn’s term here—emerged without competition on two continents—in Europe and North America—particularly in the 19th and 20th centuries. However, in the last decade of the last century, ideas, concepts, and theories created in the South have appeared and are worth a closer look, critical analysis, and empirical application. We are thinking, for instance, of the post-colonial perspective (theory), which since the 1980s has aimed to change how relations between people of the North part of the globe and those outside it are perceived. Originally, post-colonialism was exclusively the domain of intellectuals from the former colonial countries, but today it is an inspiring trend in global research (Young 2012). Post-colonialism is an intellectual discipline connected with analyzing the situation of state structures and people in areas that for many years found themselves in colonial dependency on the states of Western Europe. It also involves showing how the individual biographies of the inhabitants of post-colonial areas bear on their life choices—political and intellectual. In the post-colonial trend are the works, for example, of the Indian intellectual Gayatri Chakravorty Spivak, who was born in Kolkata (India), works at Columbia in New York, and is engaged, among other matters, in researching the diaspora situation of post-colonial Indian academics in the United States (Harasym 2011: 89). To a certain degree, he is writing about his own position among Northern intellectuals:

¹ The concepts we use in the present article predominantly correspond with the terminology introduced to the literature by the specific authors to whom we refer in the text. One example is Raewyn Connell, who uses the dichotomy of the world of the North (highly developed countries, the world centre) and the world of the South (less developed countries, countries of the periphery). We most often make use of the simplified terminology connected with the world-system paradigm of Immanuel Wallerstein. He sees the contemporary world as three complementary structural elements: the core, that is, the world centre (the countries of Western Europe, the United States, and Canada, and the countries of the Pacific basin, with Japan playing a particular role); the semi-periphery (certain countries of South America and the post-communist countries), and the periphery (most of Africa, Asia, and Latin America). For the analytic needs of this article, the authors have adopted a dichotomous division, that is, a division between the centre—the highly developed countries (the countries counted in the centre by Wallerstein and those that are candidates for the centre, such as China, India, Russia, or Poland) and the peripheries, or poorly developed countries (Africa, parts of Asia and Latin America). We are aware that the real divisions in the world system are considerably more extensive. Nevertheless, in accord with the ideal-typological approach, we emphasize the most important differences in the designated structures.

[...] But the real demand is that, when I speak from the position, I should be listened to seriously; not with the kind of benevolent imperialism, really, which simply says that because I happen to be a Indian or whatever... A hundred years ago it was impossible for me to speak [...] (Harasym 1990: 80).

Other leading representatives of the post-colonial trend were either born in the territories of former colonies or were fascinated with that world. But the intellectual development of both was tied to the world of the North. We are thinking here, among others, of Frantz Omar Fanon (born in 1925 in Fort-de-France, Martinique, died in 1961 in Bethesda, Maryland), who wrote that

[...] For centuries Europe has hampered the development of other peoples, subordinated them to its own aims, its fame; for centuries, in the name of an alleged "spiritual adventure" it stifles the breath of nearly all of humanity [...] The task of the Third World is to rewrite the history of man, including the magnificent cultural creations of European thought and European crimes (Fanon 1985: 213–216).

Edward W. Said expresses his own thoughts in a similar spirit. In his books he describes the past and contemporary relations between imperial states and their colonies:

[...] Many people, both in what is called the western world, that is, in the metropolis, as in the Third World, that is, in the previously colonized world, live with the same conviction that the era of great, classic imperialism, whose high point was [...] the age of empires [...] although it officially ended with the disassembly of all colonial structures after the second world war, it still, in one form or another, exerts a major influence on culture (Said 2009: 5).

These words confirm the ongoing domination of Western thought, although there is an ever clearer engagement of thinkers from countries ascribed to the global South.

The simplified distinction of North and South was introduced by Lord Franks in 1959. He acknowledged at the time that the most important concept in reference to the division of the world and the accepted criteria of that distinction had emerged in the thinking of researchers from the circle of countries belonging to the North. Among the exceptions are dependency theories (*teoría de la dependencia*) which appeared in mature form in the 1960s in the countries of Latin America, and also some concepts and theories of the endogenous group of ideas about social change and development. Theories of dependency and endogenous development constituted critical responses to the domination of modernization theories, which emerged in European and North American universities. Authors of works critical of modernization ideas pointed primarily to the various ideological-doctrinal consequences resulting from the premises of modernization theory, as well as noting methodological insufficiencies and the ambiguity of basic concepts and definitions (Krzysztofek, Szczepański 2005: 83–84).

One of the more important representatives of the historical theory of dependency, which is sometimes, on account of the radicalism of its theses, called neo-Marxism, was André Gunder Frank (1966, 1969). He made use of the works of a whole pleiad of Latin American scholars, such as Raul Presbisch, Celso Furtado, or Federico E. Cardoso. But at the same time, another view of dependent development is Immanuel Wallerstein's concept of a world system (1974)—which is still important in terms of analyzing the contemporary globe.² Reaching back to the 16th century, Wallerstein

² Immanuel Wallerstein received the first ISA Prize, awarded for achievements in sociological research and practice, for the concept of the World System and other work (Yokohama 2014): *Global Dialogue*: vol. 4, 2014.

accounts for the contemporary division of the world into centre, semi-periphery, and periphery, in which the countries of the centre conduct an imperialistic policy toward the remaining structural elements of the globe. The countries of the centre impose, Wallerstein claims, their own economic thinking, culture, and politics, strengthening their hegemony and successfully legitimizing it. Further, in regard to endogenous theories, it is worth noticing, among others, the ideas of Mahatma Gandhi (1969) in connection with good independence or development without force.

This very introductory information already underlines the importance of at least a few theories emerging outside the Northern sphere. They constitute a kind of counterweight—even if not a large one—to European and North American thought. They also supplement those thoughts. It is not possible after all to claim a fuller view of the global situation on account of using an ethnocentric perspective—in the theoretical and methodological dimension—to observe and describe it.

Simply put, in the public sphere today the world picture that prevails is the one created by world capitalism, science (education), and riches (resources). Political, educational, and economic systems are created in countries with the largest influence on the change and development of the contemporary world, in metropolises and megalopolises, contributing to their further expansion, favouring new forms of domination, and even deepening global inequalities. This is a description of the world centre, in which universalist theories arise; the point is to combine theories emerging from countries counted by Wallerstein as belonging to the semi-periphery and periphery of the world into mainstream thought. These are theories which, with the exception perhaps of the above-mentioned dependency and endogenous development theories, have not acquired universalist status. It is hard, nevertheless, to speak of any kind of global symmetry in this respect. Doubtless it is neither possible nor necessary. And yet, in the present article, we attempt to respond to doubts connected with the historical asymmetry of social theories shaped in various spheres of the globe. We refer to the beginnings of sociology and the classic works of the 19th and 20th centuries. In this context, we point out selected theoretical views whose intellectual roots reach outside the world of Europe and North America. In essence, our work is a kind of academic reclamation of the above-mentioned Southern theories.

Universal Domination: Its Apologists and Critics

The origins of sociological theory should be sought by following the traces of Europe's development and its imperial policy, then in the domination of the United States. Europe, called the cradle of civilization, strove to create a world of a kind Samuel P. Huntington has described as one dimensional,

[...] Then, with the beginning of the modern era, about A.D. 1500, global politics assumed two dimensions. For over four hundred years, the nation states of the West—Britain, France, Spain, Austria, Prussia, Germany, the United States, and others—constituted a multipolar international system within Western civilization and interacted, competed, and fought wars with each other. At the same time, Western nations also expanded, conquered, colonized, or decisively influenced every other civilization (Huntington 1996: 21).

This is a picture of the northern part of the globe, which changed after the Second World War to create a bipolar world, and then, in the 1980s and 1990s, into a multipolar world as a result of the events in East-Central Europe. In the 19th century, the United States joined the group of imperial world powers.

Noam Chomsky in his *Towards a New Cold War: Essays on the Current Crisis and How We Got There* (1982) emphasized the persistence of imperialism, which had not ended with the downfall of the classic empires of colonial times. The divide was still deepening between rich and poor countries, as was clearly exhibited in the report *North-South: A Program for Survival*, published in 1980. The conclusion was one of crisis and threat:

[...] attention should be paid to the “most important needs” of the poorest nations of the southern hemisphere; hunger should be eliminated; economic and industrial productivity must be increased; the practices of multinational corporations must be “restricted”; the world monetary system should be reformed; the methods of financing reform must be changed to eliminate what has aptly been called the “credit trap.” The basic question is [...] power-sharing, which means making it possible for the countries of the South to participate more equally in “power and decision-making within the framework of monetary and financial institutions” (Said 2009: 324).

It is still an apt diagnosis today.

From the perspective of this problem it is worth emphasizing that the influence of Europe, and then of the United States, does not apply solely to the economic world and the above-mentioned world of culture, but also to academic ideas and theories, which in considering the North’s vision of the world to be the proper one, try to propagate or simply impose it in the global dimension. The influence of the North also encompasses its own, partly ethnocentric, world of academic ideas and theories, which it treats as universal. In such a world ‘contrary visions’ do not receive general recognition and intellectual legitimacy. Before the United States acquired the status of world hegemon, this title belonged to European powers (England and France), which not only triumphed economically and militarily, but also intellectually. The intellectual domination of the world vision began to be elaborated and propagated by European thinkers in very distant times, but for sociologists the most important period occurred after the French Revolution, when three ideologies were born: conservatism, liberalism, and socialism, and then the first sociological systems. It is after all a fact that the spectacular and breakthrough events of modern human history took place in Europe and their effects determined the direction and intensity of the world metamorphosis. These events also stirred the minds of scholars of the time, who made efforts to explain the conditions surrounding them. Thus Europe was from the beginning the cradle of scientific thoughts and ideas; and after Europeans settled the American continent, the United States was as well. Conviction of the correctness of such domination is shared by some American intellectuals, including William Bennett and Allan Bloom, who consider that the appearance in the academic world of women, African-Americans, gays, and Native Americans, within the framework of real multiculturalism and new knowledge, confirms the barbarian threat to Western Civilization (Said 2009: 364). These words emphatically show—although we retain here a basic caution—the distance between the conviction about the power of Western civilization and the rest of the globe.

The Founders of Sociology and their Intellectual Inheritance

The foundations of sociology, which were built in Europe over the course of succeeding centuries, have captured numerous minds in global society. Sociology as an independent academic discipline was constituted at the end of the first half of the 19th century, but its original founding ideas and theories emerged much earlier. Relinquishing a trip to ancient times, it is worth acknowledging that the breakthrough moment was the European Enlightenment and French Revolution, which, in sweeping away feudalism, led the western world into a period of disintegration. This indirect link in the law of three stages of social change was written about by the French philosophers and sociologists Claude Henri de Saint-Simon and Auguste Comte. The cause of the crisis was the passage from a feudal and teleological system to an industrial and scientific one (Saint-Simon 1968: 357): human development (civilization) had passed through the stage of uncertainty, that is, the teleological era; an era of partial certainty and uncertainty, that is, the metaphysical era; and the era of certainty, that is, the positive (scientific) one.

The post-revolution disintegration was deepened by the effects of the industrial revolution, which not only produced a wave of migration from the countryside to the cities, but also transformed social structures and changed the lifestyle of individuals and social groups. A process of industrialization began and thinkers of the time—Saint-Simon, for instance—admitted the necessity of a general rebuilding of the social system, which should manifest itself in material conditions as an industrial system and in the spiritual sphere as a system of scientific beliefs and proofs (Saint-Simon 1968: 362–363). This is what happened.

In the 19th century, the first ordered sociological system appeared among European academic ideas. It was created by Auguste Comte and reconstructing his system is important as this philosopher-sociologist has symbolic significance in regard to the beginning phase of the domination of sociological thinking. Comte was convinced that it was necessary to reform science, thus his reflections concentrated on two fundamental problems: the problem of science in general and the problem of a science of society. With regard to the substance of scientific theory, his departure point was knowledge: that is, formulating claims based on facts and the connections between facts (Comte 2001: 15–26). His scientific theory rested on a distinction between abstract knowledge (the laws linking the facts of nature) and material knowledge (a description of facts). Sociology, whose programme entailed research by natural, empirical, and historical methods into human societies, their order and progress, belonged to the abstract sciences (Skarga 1977: 146–152). He thereby defined the subject matter of a science about society, whose permanent construct is order (social equilibrium) and progress (the dynamic of society). These states, although separate, spontaneously penetrate to the general sphere constituting the public mind (Skarga 1977: 157). As a result, we are dealing with social development, whose place in the world sociological system is unquestionable. To the concept of social development should be added the idea of social evolution of Herbert Spencer, who wrote that ‘social institutions and civilization are both the result of a process of evolution, to which mankind is subject equally with

nature in general...’ (Kasprzyk 1967: 126). ‘According to Spencer, evolution consists in two opposing processes: integration and disintegration’ (Kasprzyk 1967: 60).

In the history of sociology the sociological system of the French thinker Emile Durkheim is particularly important. He divided sociology (rational knowledge) from psychology

[...] extending scientific rationalism to the study of human behaviour by showing that considered ex post, it can be reduced to relations of cause and effect, which can then, with the aid of no less rational an operation, be transformed into principles of action in the future (Durkheim 2000: 4).

The sociological system of Emile Durkheim, author of *Principles of Sociological Methods*, was innovative, although he borrowed from the work of such thinkers as Montesquieu and Rousseau. This was a successful extension of French social thought, which was becoming increasingly strong in world scholarship. In terms of the development of science, particular attention is due in Durkheim’s broad and varied sociological system to his definition of the concept—so important in sociology—of the indicator, treated as an element of the methodology of sociological research (Szałcki 1964: 150). Durkheim was the author of the first monograph in sociology, *Le Suicide: étude de sociologie* (Polish edition: Durkheim 2006), which till today serves sociologists as an unquestioned model of monographic research. Born in Epinal in Lorraine, Durkheim studied social institution models by drawing from observation of religious life among Australian Aborigines. Durkheim’s construction of social dichotomies, whose transformations are the effect of an intensifying division of work, was also important. In his work *On the Division of Social Labour* (Durkheim 1999) Durkheim shows at one end of the scale a society based on mechanical solidarity—a traditional society, characterized by a simple, mechanical division of labour and the action of criminal law (which he adopted as indicators for labelling a specific society mechanical); and at the other extreme a society based on organic solidarity—contemporary society, characterized by a complicated division of labour and cooperative law (indicators which he employed to label a society organic). In Durkheim’s opinion, all societies, without exception, are subject to an evolutionary transformation from a society based on mechanical solidarity to one based on organic solidarity. Only the tempo of the transformation of each could be different (Durkheim 1999). This Durkheimist idea not only entered the sociological canon, but has occupied an important place among conceptions of social change and development.

The theories and concepts introduced to science by the first European sociologists not only dominated global sociological thinking but contributed to concepts being formulated on the basis of a conviction about ‘a monopoly on the Truth’ in the process of describing and indicating the development path of all societies without exception—constituting the foundation for succeeding theories. These conceptions, acquiring unambiguous domination in intellectual debate in the North, limited, in the case of many scholars, the perception of the value of ideas, concepts, or theories coming from the South. This does not at all mean that these latter have greater explanatory value; it is a matter solely of being able to see their existence and values. The above considerations appear to confirm R. Connell’s theses about the domination

of the North in world scholarship. In tracing the development of sociological thought in ensuing years, it has to be noticed that succeeding representatives of the social sciences (of sociology) formulate theses that maintain this ‘programmed domination’.

It is hard to present, in one article, all the sociologists whose conceptions have permanently entered the canon of world sociology, but Max Weber, whose part in producing the domination of European thought is unquestionable, can not be omitted. This German proponent of a humanist sociology rejected the analogy between sociology and the natural sciences. According to him, social reality is not exterior to the individual and imposed on him, but arises as a result of the process of interaction between individuals. It is people who create a social reality and

[...] sociology is a science, which thanks to interpretation strives to understand social activity and thereby to contribute to explaining its course and effects. ‘Activity’ means human behaviour (external or internal acts, omission or elimination) if, in so far as acting, or acting much, it is linked with a certain subjective sense. On the other hand, social ‘activity’ is activity that in the intended meaning of the actor or actors applies to the behaviour of other people and is oriented toward them in its conduct (Weber 2002: 6).

The object of sociological interest is social action, which constitutes the foundation of Weber’s humanist sociology. In his numerous works, this German scholar not only showed a new way of practicing sociology, but exerted an enormous influence on social diagnosis, which made it more possible to understand the division of the world into the rich North and the poor South. In this regard, he combined the idea of Protestantism with the development of capitalism, that is, religion with economics. It was the Protestant idea that dominated the minds of people of the North. God still constituted the source of the grace necessary for salvation, but the ‘system of dependence’ had changed: ‘It is not God who is concerned with man’s good; God does not exist for man’s sake. Man exists for God and on him rests the duty of trying for His regard. And since the road to Heaven leads through Earth, working for the salvation of the soul is equivalent to concern for increasing the goods acquired through work’ (Weber 1994: XIX). The sacralization of work thus occurs and is manifested in the passage from *homo religiosus* to *homo oeconomicus*. The Protestant ethic was ascribed a deciding role in initiating the passage from traditional society to capitalist society. A traditional society, concentrated on its own survival and characterized by the vicious circle of poverty, could enter the path of development exclusively by adopting and being guided by the idea of the Protestant ethic (Jelonek, Tyszka 2001: 64).

Weber’s considerations on the ideas of Protestantism and the essence of capitalism led him to analyse social structures and to oppose his findings to the dichotomous division of society presented by Karl Marx. Weber assumed that there are many different criteria of social division—and they are not exclusively economic as Marx believed. He himself took three into consideration: economic (social classes), prestige (social layers), and power (belonging to a party) (Weber 2002: 228).

On account of the complexity of Weber’s sociological thought, we have selected only very modest fragments, while bearing in mind the many other significant ideas that he introduced to world scholarship. We are showcasing the motifs that appear to have contributed to maintaining the unequal influence of the North’s and South’s scholarship. While we won’t—for instance—make a closer analysis of the concept of

ideal type, we believe the excerpts we have given of Weber's creative achievement provide sufficient proofs to confirm the fact of the domination of European thought in the context of the analysis of social phenomena and processes.

In time, the United States, whose power, including intellectual, had been at least partially established on the basis of ideas created in the Old World, joined Europe in its domination of scholarship. Early American sociological thought that joined the global intellectual domination included descriptive sociology, of which the Chicago School formed a part. The aim of its representatives was to create methodological premises for empirical research—the techniques of field work. With time, they created their own concepts and theories, which acquired indisputable domination in the world of scholarship: examples are structural-functional theory and symbolic interactionism. The long years of the North's intellectual advantage had begun, although, within its borders, symbolic 'intellectual skirmishes' between Europe and United States occurred. Today it appears that the representatives of the American world of academics have emerged victorious in that rivalry. In the whole history of the development of sociology, or more broadly, the social sciences, presented above, it is hard to find an idea from outside the northern hemisphere. But this is not because ideas weren't formed in 'that' cultural sphere, because scholars did not have sufficient creative intellectual potential. It was rather that their position in the academic world was weak because the educational system there, including higher education, was and remains weak. Thus the insufficient presence of theories from outside the a world centre is not surprising, although their presence cannot be entirely overlooked. Examples are selected theories of social change.

Sociological Visions of Change and Social Development

Sociology's mission is to analyze social processes and phenomena, particularly social change and development. In this field there are ongoing disputes over the sense of human history. They usually concern the most important historiosophical issues, and their participants present various visions of social destinies, of progress and regression, of development and backwardness, of decline and prosperity. Various appraisals of current events and prognoses of future events also appear: both visions of extreme catastrophe and scenarios full of optimism and faith have their recipients. There are still continuers of, and commentators on, the pessimistic work of Oswald Spengler (Spengler 2001)³ or Jose Ortega y Gasset (1997) about the downfall of civilization and the revolt of the masses. At the same time, interest has not slackened in the

³ Oswald Spengler's ideas of catastrophe were continued by Samuel P. Huntington, who imagined, in the 1990s, that the next world war would break out in 2010. He was inclined to such a vision by what he conceived to be the key lines of global conflict, along seven civilizational-cultural spheres: the western (North America with West and Central Europe), the Chinese, or Confucian (China and South-East Asia), the Japanese (the Japanese islands), Muslim (the Arab countries, Pakistan, and Turkey, Hindu [India]), Slavic-Orthodox (Russia, parts of Belarus, Ukraine, Romania, Bulgaria, Greece, and Serbia), and last but not least, Latin (South and Central America without Brazil, and the southern states of the USA). Cf. [Huntington 1997]. Also see [Huntington 1995], and [Koneczny 1997].

work of Pierre Teilhard de Chardin (Chardin 1984; 1985; 1987), who was fascinated by the possibility of creating a planetary civilization based on Christian love of one's neighbour. The sociology of social change has undertaken to explain the contemporary world picture, where on the one hand we have riches and a high level of civilizational development, and on the other poverty and a low, or very low, developmental level. Such a division also affects the world of scientific ideas.

The picture of global diversity has multiple sources. On the one hand, changes could be dictated by endogenous factors and be perceived as the result of the activity of individual persons or entire groups. Displaying the internal factors in the development process usually involves the concepts of community development, development from below, self-reliance, collective self-reliance, or development based on the principle of immanent change, described by Pitirim A Sorokin (Sorokin 1991). In this theoretical area, a significant place has been achieved by the doctrine of 'good independence' of Mahatma Gandhi, an Indian leader (graduate of an English university), whose ideas have entered the world canons of scholarship. On the other hand, development could be dictated by the influence of exogenous factors. This could involve contact with various groups or with a different culture, organization, way of running things, norms and values, or technical skills and technology. This type of transformation is furthered by migration and the movement of people, the development of transportation, means of mass communication, or annexations and conquests.

The most important theories of development, showing the role of external influences on the process of transformation, are generally considered to be, on the one hand, modernization theories and, on the other, dependency theories. The theoreticians of modernization treat development as evolutionary, unilinear, and similar to the process of social change. It is evolutionary, because it gradually produces—over time—change from a state of backwardness to the state of being post-industrial. It is unilinear and similar because it most often occurs in the same manner in all societies and leads—*mutatis mutandis*—to similar results. In other words, the underdeveloped countries of the world will replicate the fates of countries that are today highly developed (including intellectually), technologically advanced, and wealthy. This process will occur by way of the import of patterns and standards developed in the world centre of the globe. This proposition results from the deep conviction of the theoreticians of modernization that the cultural, technical-technological, and organizational patterns worked out in countries of the North provide the only correct path of social development.

The possibility of development stimulated by external factors is perceived differently—more pessimistically—by scholars of the so-called dependency school, sometimes called *teoría de la dependencia* or a neo-Marxist orientation; one of the few theories to have emerged in the countries of the South, dependency theory has acquired a considerable position alongside theories produced in countries of the North. The representatives of this school suggest that external influences coming from the most highly developed countries to underdeveloped countries rather petrify the underdevelopment of these latter than hasten the desired evolution (Szczeпаński 1989a).

Theories of change and social development involve a kind of coexistence of ideas originating in various intellectual worlds. They are visions, which have developed far from one another, of the transformation of countries, in which certain suggest the replication of development paths, and others seek to explain the maintenance of the status quo in the exploitation of certain countries by others. Finally, the mechanisms of development have been sought in the endogenous conditions of individual states.

The Idea of Modernizing Development

In Europe and North America, a theory of modernization emerged that drew on German, French, and American social thought (Krzysztofek, Szczepański 2005: 29–30). Among several definitions of modernization, the most important appears to be that which speaks of the place and role of underdeveloped countries in the vision of modernization development created by Northern researchers. In such an understanding, modernization describes a directional and evolutionary progression of change wherein a traditional society transforms into a modern society. Societies of this latter type are personified by the countries of the North (Western Europe, United States, Canada and the Pacific Basin countries) while ideal examples of traditional societies are provided by the countries of the South, located on three continents: Africa, and to a lesser degree, Latin America and Asia.

The authors of modernization theory assume that the continual contact countries of the South with the North is indispensable for initiating the implementation of modern development for the purpose of realizing the model represented by high developed countries. Such a definition of the process of modernization is quite common and appears in many works of outstanding theoreticians originating in the spheres of Western civilization. They assume that modernization is a progression of changes occurring in backward systems, conditioned by contact with the civilization of the North, particularly its technical know-how and technology, and business, political, and social organization. The modernization theories created by representatives of the northern world assume that the proper development path is the one travelled by countries of the West. This is the model toward which the countries of the South should strive. Modernization theories clearly show not only the civilizational domination of countries of the North, but also their intellectual advantage, which appears, among other places, in the right they claim to demarcate the path of social development for the countries of the South. Some theoreticians of modernization have declared openly that the backward countries of the world must *volens volens* repeat the destinies of countries that are today highly developed, civilizationally advanced, and wealthy.

Modernization theories emerged in the countries of the North; the development path for underdeveloped countries was also set from this perspective. Their specific natures, their exceptional political, social, and cultural conditions, were overlooked. Scholars of the North were convinced that showing them the development path was good and proper. In their opinion, nearly all countries pass through four or five imperative stages of development. These are: traditional (pre-industrial) society

→ semi-modernized (half traditional, half industrial) society → modern (industrial) society → post-modern (post-industrial) society.

It seems, however, that this cycle, and particularly its last stage, is differently perceived and described in modernization theories. In the last decades of the past century 'post-industrial society' was already being spoken of increasingly less often, while it was replaced with a new label—'information society'. Some scholars, including Yoneji Masuda (1986), or publicists such as Alvin Toffler (1997, 1998), were already then treating 'information society' as the succeeding, necessary step in the evolution of post-industrial society. Masuda, for example, spoke directly of 'post-industrial information society' as an entirely new stage in the process of universal modernization. He also claimed that only a few rich countries of the North had reached this stage. Constructing imperative stages of social development and designating the path of progress for backward countries insufficiently takes into account the specific conditions of individual countries of the South. Reasonably, such specific conditions of development could also be described by intellectuals coming from these areas, though they can not have a monopoly in this sphere either.

The theories of modernization triumphing in the middle of the 20th century met with numerous critics, who primarily questioned the justification of the generally accepted dichotomy in the modernization concept: traditional society versus modern society. Such a dichotomy had a clear spatial aspect. The societies of Europe, the United States, Canada, and the countries of the Pacific basin, led by Japan, were considered modern. The peripheral countries, the so-called Third World countries were considered to belong to the group of traditional societies. At the same time, it should be remembered that in Europe, for instance, it was possible to find enclaves of backwardness such as southern Italy, some regions of Portugal, Albania, Kosovo, Bosnia and Herzegovina, and Montenegro. And among the countries of the South there are such enclaves of modernity as various countries of the oil region, the region of Sao Paulo in Brazil, and some countries of the Far East. In addition, the thesis that modernization inevitably leads to the elimination of tradition has not stood the test of time.

The most important defect of modernization theory is its Euro-centrism and the conviction, tacit or open, that the changes that have already occurred in the countries of the North should be initiated in undeveloped areas, that is, in the countries of the South. Such a position is one of the consequences of the accepted evolutionary orientation. Its main premises state that similar causes usually produce similar effects. Analysis of the experiences of certain non-European countries is exceptionally useful in proving the falseness of this premise. For many years already, there has been a crisis of modernization in Africa, Latin America, and Asia produced by the sudden and uncontrolled opening of weakly developed economies to world markets, particularly those of Western European and North America. Such an opening, combined with an attempt to imitate foreign patterns and models, could be considered an important, though not exclusive, cause of the breakdown of modernization in the South. A major trait of modernization theory, which reduces its cognitive value, is the clear exhibition of urban social problems in the South, and the relatively lesser interest in rural

collectives, although it is obvious that the decided majority of African, Asian, and Latin American populations live in the countryside.

All these limitations mean that modernization theories leave many aspects of development and social change unexplained. This is due to the fact that in their decided majority, scientific theories have arisen in the countries of the North, after which it has been attempted to make them empirically operational in the world of the South. Activity of this sort is most often condemned to failure. It should be emphasized, however, that the more comprehensive elaboration of studies on the positive role of the diffusion of values and innovations from countries of the North to Africa, Latin America, and Asia can be recognized as one of the indubitable achievements of modernization theory. Nevertheless, this one-directional influence entails many negative consequences, which are not often recognized by the more decided proponents of modernization theories. They do not perceive in full the sometimes dramatic economic, political, and cultural dependencies to which that influence leads. Their conviction about the positive role of diffusion does not allow them independently to appraise the internal (autonomous) dynamic of African, Asian, or Latin American countries in overcoming development barriers by their own resources (self-reliance), or within the framework of collective efforts (collective self-reliance). In concentrating their attention on the concept of a unidirectional flow of ideas, modernization theories display a unilateral treatment of the problem.

Multidimensional criticism of modernization theory has not relegated it to academic archives. Ulrich Beck, Anthony Giddens, and Scott Lash have introduced the concept of reflexive modernity.⁴

Reflexive modernization, then, is supposed to mean that a change of industrial society which occurs surreptitiously and unplanned in the wake of normal, autonomized modernization and with an unchanged, intact political and economic order implies the following: a radicalization of modernity, which breaks up the premises and contours of industrial society and opens paths to another modernity (Beck, Giddens, Lash 1994: 3).

Modernization is an autonomous process, which leads industrial society to a state of anachronism, from which risk society emerges. Reflexive modernization therefore is the passage—against the will of a society's members—from an industrial society to a risk society. Reflexive modernization is a confrontation with the effects of risk society, which the system of industrial society would be unable to manage. At the same time, risk society carries with it the unpredictable dangers produced by technical and technological development. This requires self-reflection concerning the foundations of social cohesion and an analysis of existing standards and bases of rationality. A society that describes itself as a risk society becomes reflexive, that is, it becomes for itself a question and a problem (Beck, Giddens, Lash 2009: 21). The classical view of modernization has permanent structures within which the individual operates: it involves a beaten path of social development without the right of choice. Reflexive

⁴ Reflexive modernization is the growth of knowledge and the scientification of self-reflection on modernization. The autonomous passage from an industrial society to a risk society is reflexivity. Reflexive modernization means thus a confrontation with the effects of risk society. The concept of reflexive modernization is used by Ulrich Beck, Anthony Giddens, and Scott Lash (Beck, Giddens, Lash 2009).

modernization, meanwhile, is the quantity of modernity triumphing over modernization.

The critics of modernization theory include scholars of dependent development, whose theoretical foundations were created by Latin American thinkers, who found themselves, on this account, in the (sociological) world intellectual system.

Influence of the South on the Theory of Dependent Development (*teoría de la dependencia*)

Criticism of modernization theories in regard to the interpretation of backwardness and development, a certain ahistoricism of the concept, and above all, the open or hidden—as was then said—apology for the colonial (neo-colonial) system, appeared most clearly in the work of the above-mentioned André Gunder Frank, who claimed that ‘[...] Just as the society to which modernization theory is applied is undeveloped, so the sociology of development becomes ever more backward’ (Frank 1969: 21). On the basis of this and similar criticisms of modernization, the theory of dependency was created, whose intellectual sources come both from European circles and from without. The works referenced include those of Karl Marx, in his treatment of England’s colonial expansion in India, where the British intended to build the foundations for Western society in Asia (Marx 1949: 327), and other communist ideologues. The systemic vision of the world formulated by the Austrian biologist Ludwig von Bertalanffy (1984) was evoked.

William Arthur Lewis’s concept of a world divided into countries of the moderate zone and tropical countries with unlimited supplies of labour was referred to as well. Consideration was given to the idea of economic structuralism and the theories of peripheral formation of Raul Prebisch (1950), Celso Furtado (1964), and Federico E. Cardoso (1973): that is, the ECLA school,⁵ which came together at the end of the 1940s, with the United Nations’ establishment of the Economic Commission for Latin America. The particularly important—essentially innovative—research conducted within the school’s framework concerned the world system, or rather the unequal development dynamic of particular elements of that system. Then Raul Prebisch was one of the first to introduce the concept of ‘developing countries’ (*en desarrollo*), partially relinquishing the term ‘poorly developed countries’ (*subdesarrollados*) and displaying the equilibrium of those countries. He also propagated the terms ‘centre’ and ‘periphery’ in analyses of economic development.

The departure point for research into relations between countries of the centre and the peripheries was Prebisch’s study into technical-technological progress on the global scale (Lira 1986; Czyżowicz 1985). Adaptation of technical innovations and the

⁵ The ECLA (in English, the Economic Commission for Latin American) or CEPAL (in Spanish, the Comisión Económica de la ONU para América Latina), or the United Nations Economic Commission for Latin America, was one of the regional economic commissions of the UN created on the basis of Resolution 106/VI ECOSOC of 5 III 1948. Its creators and organizers provided the theoretical bases for the dependency school, which in Spanish was called *teoría de la dependencia*; this doubtless provided the label of ‘dependists’ used to describe the scholars of this group.

related technology occurred most rapidly in countries of the centre, decidedly more slowly in dependent and colonial countries. In the Third World, only a few enclaves of modern economies were created, mainly in the extraction industry and plantation agriculture. Central countries, that is, Western Europe, the USA, and Japan, occupied a privileged position from the very beginning in the international division of labour and trade, as well as in intellectual activity, simultaneously condemning many African, Asian, and Latin American countries to subordinate positions in the world economy.

Dependency theories emerged from the dialogue of Latin American researchers, but shortly underwent a special kind of universalization. They were brought to bear on the totality of relations between rich and poor countries. Such concepts were developed by, among others, Immanuel Wallerstein and Alain Touraine. Nevertheless, there is no doubt that the birthplace of dependency theory is the South, where development is treated not as occurring in stages, but as an evolutionary, multilinear, and divergent (varying) process of social change (Krzysztofek, Szczepański 2005: 108).

Dependency theory concentrated attention on three basic areas: the theory of absolute dependence and domination supplemented by the concept of unequal exchange and unequal accumulation on the world scale; the concept of sub-imperialism; and the theory of the world system. The first above-mentioned theory focused on the process of creating a world market in the 17th century, which caused the loss of autonomy and economic, political, and cultural self-sufficiency of certain countries. Other countries, particularly those of northern and western Europe, made use of largely internal forces of development to acquire an advantage over these former. The remaining countries came increasingly to depend on exogenous factors, which became dominant in the process of their development and change. The developed countries of Europe began to colonize others, treating them exclusively as providers of raw materials, while they themselves attained the position of industrial centre. In such a configuration, the countries of the North increased their hegemony, and the development of the countries of the South was made dependent on the level of their exploitation by the North. Thus radical dependency theorists explain the West's riches—not entirely correctly—by the poverty of Africa, Latin America, and Asia. Development and backwardness are thus two sides of the same medal and the kings of capitalism and imperialism in developed countries and the social organizations of undeveloped countries are closely connected with each other—they only constitute two different aspects of what is really one global problem (Baran 1957: 250). The basic cause thus of the world's polarization and the appearance of capitalism of the centre and of the periphery, of rich and poor countries, North and South, was colonial dependence and its most modern version—neo-colonialism. According to E. A. (Teddy) Brett (1973), a professor from the Republic of South Africa, the phenomenon of backwardness can not be—to the slightest degree—explained without reference to that dependency. Such a diagnosis is completely contrary to the appraisal of underdevelopment of Africa, Latin America, and Asia formulated by the theoreticians of modernization. More precisely, the dependency theorists reject every point of the 'modernization understanding'. The very category of 'dependency' expresses the qualitative characteristics of the system of mutual ties between the capitalist countries of the centre and the peripheral countries.

This means that the phenomenon of backwardness must be analyzed in reference to the whole world capitalist system, and not solely in regards to the situation of three underdeveloped continents. They reject, at the same time, the essentially apologetic claim of the theoreticians of modernization, who minimize the role of the colonial system in creating the structure of peripheral capitalism.

The theories of dependent development have concerned, above all, the economic sphere of dependency, but attention has also been paid to the political and cultural aspect of dependency. In the political sphere, dependent development appears in the asymmetry of pressures and influences. The governments of central countries, after a period of wielding direct power over the peripheries, still exert more or less clear pressure on them, imposing or sanctioning—as Gundar Myrdal says—‘kleptocratic governments’. Third World countries have been and are still forced—with various results it should be admitted—to agree to grant licenses for geological ventures and trade contracts, to accept the presence of foreign armies and bases, to give support at the forum of international organizations, and to not recognize certain political facts. Decidedly less often, such ‘arguments’ as coups are used to fold up wayward governments in Africa, Asia, and Latin America (Szczepański 1989b).

Dependent development occurs also at the level of cultures and institutions, and its most important manifestation is ‘symbolic force’ (Bourdieu, Passeron 1970), which consists in continually renewed attempts to transmit to the countries of the South ideological and doctrinal systems, norms and values, and institutions born in foreign, European cultural circles. Symbolic force can lead to a partial, and sometimes to a complete loss of cultural identity. It thus inevitably degrades the native culture and deprives it of social sense, condemning African, Asian, and Latin American cultures to accept a foreign culture, which is often incomprehensible to them. The legible cultural system thus declines, with varying intensity. Edward Shils wrote that it functions as the main centre of the social system (Shils 1970); it also constitutes a key condition of its existence.

Another instalment of dependency theory appeared in the concept of sub-imperialism, which was formulated as an answer to the act of internal segregation conducted within the framework, already legitimized, of division, that is, the division of peripheral countries into groups of the poorest countries and the oil-producing countries. The latter—with the status of newly privileged countries—were seen as countries of average capitalist development. These countries formed special types of centres of economic domination in Africa, Asia, and Latin America (Krzysztofek, Szczepański 2005: 120–121). Referring, among other things, to such a state of affairs, the Brazilian sociologist Ruy Mauro Marini (1972) created the concept of the world divided into three, whose main elements were imperial countries; then sub-imperial countries, that is, those entering the stage of monopoly and finance capital; and the remaining countries. In such an arrangement, there is direct or indirect exploitation of the sub-imperial and peripheral countries. This practice confirms the privileged position of the imperialist countries, which are continually strengthening their own world hegemony.

Numerous reservations were expressed in regard to the concept of sub-imperialism, inclining scholars to undertake new studies and resulting in the creation, in the

1970s, of world-system theory by a professor of New York State University, Immanuel Wallerstein. In consequence, representatives of the North also became adherents of dependency theory, which had arisen in the Southern part of the globe. Nevertheless, it can not be refuted that dependency theory was originally conceived in countries of the South.

The emergence of a world system, which in contemporary times has the form of communicating vessels, goes back to the 16th century, when Europe's global economy was created under the leadership of England and Holland. Already around 1640, the world had been distinctly divided into three structurally dependent elements: core countries, and countries of the semi-periphery and periphery. From the recession that took place at the turn of the 17th to 18th centuries, England emerged victorious. Until the outbreak of the First World War, relatively rapid industrial development took place, and to a lesser degree, agricultural development. Production required markets, which came to be the countries of the semi-periphery, and more particularly, of the periphery. After the Second World War, a political system was created which, in a more or less changed form, has persisted till today. The United States, with the countries of Western Europe, Australia, and Japan, acquired hegemony in this system. Today they constitute the core of world development. Russia, China, and India are trying to join this group. The group of countries of the semi-periphery includes developing countries and post-communist countries, which are also striving in the direction of the world centre. The remaining, more numerous group of countries, with the largest number of people, creates the world's periphery.

When we look at the world through the prism of world-system theory, we see then three interdependent groups of countries, three complementary structural elements: the core, or global centre, the semi-periphery, and the periphery. They create a world economy of a capitalist nature, based on an axial division of labour. Changes are forced upon particular countries and groups of countries primarily by the global system's logic of development (Wallerstein 1974).

World-system theory is subject to criticism, as are the other dependency theories. It constitutes, nevertheless, the main tool for analyzing the development of countries of the South, as its foundations emerged in the conditions of the undeveloped part of the world. This is not an *a priori* acceptance of the social conditions of the South by the scholars of the North, but a reflection of the 'prevailing conditions' of Asia, Africa, and Latin America. It should also be noted that voices from the South were heard by the North. Taking into consideration the unquestioned domination of the North in constructing theories and concepts, this circumstance is exceptional: 'the hearing of what is unheard, that is, as if it did not exist'—is worthy of particular attention.

Dependency theory's greatest virtue—but one which is questioned by researchers of modernization—is the diagnosis contained in it of the countries of the periphery, in general. The theory points to the polarizing role of colonial and post-colonial dependency, to the true shape of the present economic, political, and cultural order on the global scale. Furthermore, the external determinants of underdevelopment and backwardness, which are largely neglected by optimistic modernization theories, have been exhibited.

The radical pessimism of *teoría de la dependencia*, which is most fully expressed in the idea of the ‘development of underdevelopment’, questioned the modernization myth of backward countries ‘catching up’ with highly developed countries by showing the multidimensional nature of their dependency and its influence on the continual process of ‘development of underdevelopment’. The essence of the unequal exchange in economics, the asymmetry of political pressure, and to a lesser degree, ‘symbolic force’, was thereby unmasked. In recent years, acts of force in relation to the natural environment in the Third World and the export (redeployment) of dirty technology are increasingly being written about. Dependency theory most aptly read the exploitation, and in moral and ethical categories, the unjust nature, of relations between the world centre and its peripheries.

One serious accusation made in regard to dependency theories is that they entirely overlook the role of internal factors in the process of development; another is the intuitive nature of the conceptualizations formulated. Furthermore, the crisis of the 1970s and that of the first decade of the 21st century have made the creators of dependency theory aware that regressions are not recorded solely in countries of the South.

Mahatma Gandhi and the Endogenous Theory of Social Development

The slow relinquishment by many European, African, Latin American, and Asian scholars of the paradigms of modernization and dependency resulted, first, from the recognition that the South’s ‘catching up’ with the North was a myth. Criticism of this paradigm was clearly furthered by the breakdown of large modernization projects in several non-European countries (for instance, Iran and Nigeria). Second, the main fault of dependency theory was to ignore the internal conditioning of backwardness. The progressing stratification in the Southern sphere and the varied nature of relations between individual countries of the centre and periphery were not taken into consideration.

Criticism of modernization theory and dependency theory made scholars aware that there is no universal model or theory of development. This inclined certain scholars to construct new visions of progress and the transformation of Africa, Latin America, and Asia. Realization of these visions was to be based on internal resources and the potential of specific countries. Underdeveloped countries were recommended to ‘rely on their own strengths’, ‘depend on themselves’, and to ‘self-develop’. Progress and development were seen in terms of (naturally) limited forces and independent models (not imitating foreign, imported ones). Internal factors played a deciding role, and external factors solely aided and catalyzed development. In constructing such a model of endogenous development, ideas coming from both the North and the South were taken into consideration.

The model reached into slightly past times to draw on Pitrim A. Sorokin’s concept of immanent change, which displayed, above all, the multiplicity of internal development factors. A more contemporary idea gave prominence to local societies, which were seen as the main actors and promoters of change. The careers of various con-

cepts of local development, of the renaissance of localism, or the return to a more efficient functioning of small fatherlands, should not thus cause surprise.

Simultaneously, theoreticians in endogenous development milieus did not refer directly to any sociological, economic, or political theories. They claimed that their inspiration came from elements of Mahatma Gandhi's doctrine and the recommendations of Ernst F. Schumacher (1981). From the viewpoint of this paper, it is their reference to concepts of the Indian thinker that are important. From his system of thought they drew, primarily, the idea of 'good independence' (*swaraj*): 'Let there be no misunderstanding of my concept of *swaraj*'—wrote the Indian thinker—

It is entirely independent from foreign control and entirely independent economically. *Swaraj* is not solely independence, but a healthy and noble independence. If the aim of *swaraj* were not to raise and improve our culture, it would have no value. *Swaraj* is a state in which the good of not even the lowest of India's sons is overlooked. *Swaraj* means for me the liberation of the poorest among us (Tokarczyk 1984: 234; Lazari-Pawłowska 1963; Lazari-Pawłowska 1967; Justyński 1975; Tokarski 1979).

The idea of *swaraj* is connected directly with the idea of self-reliance and economic autonomy—*swadesi*. Originally, the term *swadesi* was used for the boycott of English goods in India, but by the 1930s it had acquired a new connotation: it became the slogan-symbol of the struggle for the economic independence of the country. Clear reference is made in endogenous theories to Gandhi's most well-known ideas: non-violence, *satyagraha*—insistence on truth, non-cooperation, and civil disobedience (Gandhi 1969; Muller 1981).

Like the Indian philosopher formerly, so today's 'endogenists' prove that rejecting violence is the purpose of history and that acquaintance with the techniques of non-violence shows us that history is logical. Sometimes, however, the 'non-violent struggle' is understood in these new concepts in a particular way. For example, it is referred to by leaders in Third World countries who reject the postulates of nationalizing and socializing foreign enterprises and capital. It is hard, though, to determine whether such behaviour is in accord with another moral imperative formulated by Gandhi: 'In desiring to repair an injustice'—he wrote—'we can not afford to wait until the wrong-doers become aware of the impropriety of their own conduct [...] On the contrary, we have to fight wrong; directly or indirectly cease to cooperate with the wrong-doers' (Gandhi 1969: 250). As is well known, one of the aims of that struggle was supposed to be *swadesi*—the autonomy and sovereignty of the economy, which was not possible without taking the risk of nationalization. We intentionally underline the element of risk, as acts of nationalization in the peripheral have produced highly variable results. Sometimes they have even led to the devastation of the nationalized sector of the economy, and a good example of this was the fate of small and medium-size businesses in Uganda after the dramatic expulsion of the Asians (1972). As we see, Gandhi's ideas played an important role in shaping a new vision of world development, and Gandhi himself has taken a permanent place among thinkers of global significance.

In addition, theoreticians of endogenous development referred to the ideas of Ernst F. Schumacher, who was convinced that technological development could produce a new trend, leading us back to the real needs of human beings—which also

means to their proper scale. A human being is small and thus small is beautiful. To be set on giantomania is to be set on self-annihilation (Schumacher 1981). Schumacher defended a human scale of development, free from the giantism fetishized by the then ideology of growth, which had penetrated all social systems. He was a proponent of adapting technology to specific cultural and ecological conditions, and also of accepting the role of individual persons in triumphing over poverty and backwardness. 'Good works' should facilitate this process.

Endogenous theory valued, in the process of development, the strength of factors imbedded in a society's interior. In this connection, the phenomenon of disassociation, which signified the desired cessation (or limitation) of ties linking poor countries of the South with rich countries of the North, became a categorical imperative. It is not a matter here of complete autarchy, but of a certain reorientation of the relations of Africa, Asia, and Latin America with the central states and emphasizing the importance of relations within the sphere of Africa, Asia, and Latin America and specific regions of these three backward continents. The term 'disassociation' has a second significance—it refers to the objective contradiction appearing inside a certain society and in its relations with other societies (Sztompka 1982). This contradiction, say theoreticians of endogenous development, should be eliminated or at least limited.

Loosening the ties between the South and the North is accompanied by the idea of the independence of poor developed countries and 'collective self-reliance'. The essence of collective self-reliance consists in the continual exertion of united political and economic pressure by the backward countries on the developed countries. The strength of the South is the result of mutual agreements of the cartel type, concluded by producers and exporters of the most important raw materials and general economic cooperation between those countries themselves. If such cooperation does not occur, then there will be no prospect of transforming the South from dependence on external factors into the domination of internal factors. Collective self-reliance is the only method for countries to liberate themselves from ties with the countries of the North and make use in the development process of factors inherent in the local community, region, society, and continent.

Nevertheless, the creation of the forces of mutual action in the countries of the South is an unusually difficult phenomenon, because it requires overcoming not only economic backwardness, but also certain elements of tradition. It would seem that the beginning of success in disassociation requires creating a situation where basic human needs are met. It is a matter, above all, of access to potable water, of the struggle against hunger and malnutrition, the provision of medical care, the fight against illiteracy, the provision of housing, food production, and the use of natural sources of energy. The realization of these premises should occur through the efforts of local communities, societies, and continents. Then development would make better use of the available forces and be more effective.

We must state clearly, however, that realizing the project of disassociation among the countries of the South will not be either a simple or 'quick' process. The premises are very optimistic, but the obstacles to their realization include not only the policies of the North, but also, above all, the South's tradition in connection with economic

management. This tradition, in spite of many positive aspects, is still functioning as a brake on development processes, which in endogenous theories are based on using the force of internal factors. It is a matter, among other things, of preferring tribal life to activity on behalf of the country and whole society, the low level of ecological awareness, sanctioned by the traditional style of life and economics, or the lack of conviction about the necessity of fighting illiteracy and striving to possess knowledge and abilities. The latter constitutes, to a large degree, the reason for the Southern intellectuals' lack of competitiveness with their colleagues from the North.

Endogenous development also calls for the mobilization of citizens and the creation of cooperatives, which requires major structural changes, particularly in the economic and political sphere. An essential condition is also, or perhaps primarily, a change in the consciousness of the South's inhabitants. They have to understand that the conditions surrounding them are their conditions, and that they must change them by their own efforts. In the economic sphere, it is necessary to change the form of ownership of the means and factors of production: land, water, and infrastructure. Democratization and the decentralization of powers are also indispensable. Many countries of the South should begin with real guarantees of basic human rights, 'eliminating tortures and repressions'. Every cooperative 'relying on its own strengths' must be able to direct the entirety of its own affairs, to set the principles of cooperation with other associations without any kind of external interference, etc. The role of the state should be limited chiefly to a caretaking function and to concern for the weakest cooperatives, requiring preferences and privileges. In foreign policy, the state must strive for at least the partial elimination of debts and access to the markets of industrialized countries, and support economic cooperation between countries of the South.

The concepts of endogenous development should be treated as a collection of indicators concerning many areas of life in peripheral countries. Their realization would bring about a radical socio-political transformation, which would create the foundation for a process of real development of the South. But when we look at contemporary Africa, Asia, or Latin America, it would seem that endogenous theories are more utopian than realistic.

Theories of endogenous development are a model of social development for poor developed regions of the world. It is not an a-priori-type vision, as it takes into consideration, among other matters, the Indian conviction of the causal strength of internal social forces. But the idea of endogenous development has not found wide acceptance among the rulers of backward countries. Nevertheless, in the context of the present article, it should be clearly emphasized that this was another idea about development paths to have arisen largely in countries of the South.

Michael Barrat-Brown in Conclusion

We have treated the present text as our voice in the discussion of three books by Raewyn Connell, who calls for the broader world to accept academic ideas and theories shaped by the minds of Southern scholars. This is the proper view because,

as we have tried to show, an unquestioned—and historically justified—primacy is held in world knowledge by theories that emerged in the countries of the North. In addition, theories produced in the intellectual circles of the North claim to speak not only of their own conditions, but also about the less known conditions of the South. The theories of modernization development could serve as an example. Dependency theories, as we have emphasized repeatedly, are exceptions in the North's world of academic hegemony. The category of 'exceptions' should also include elements of the theory of endogenous development, with particular consideration for the contribution of Gandhi's idea of nonviolent struggle. It was Gandhi who ordered Indians to care for even the smallest element of culture (tradition), because it was only thus that the culture could survive colonialism and post-colonialism, and bring back the 'good independence'. The ideas of Neil D. Bissoondath (who was born in Arima, Trinidad and Tobago, but lives in Canada) have found a place in contemporary sociology. Educated at York University and residing in Montreal, Bissoondath gathered around himself a large group of critics of the policy of multiculturalism—which since 1971 has constituted the foundation of Canadian society. His basic idea could lead to rejection of the policy of multiculturalism, which encloses the representatives of ethnic groups within the framework of their own societies and makes development impossible. It encourages the convulsive maintenance of traditional cultures, separating them from all initiatives to build and participate in the cultural mainstream of Canada (Bissoondath 1994). Both Gandhi and Bissoondath were thinkers of Southern origin, educated in European or American universities, who left a clear mark in the world of ideas. This confirms the idea that in analyzing subject matter we must remember about the differences in access to education between the North and the South and the undevelopment of the South in the development of scientific and intellectual ideas.

We are aware that the issue we have outlined is only a minor fragment of the broader whole and the deeper question of the social sciences, although not exclusively. We also know that intellectual representatives of the world of the South, thanks to their own pertinacity, are increasingly being hosted in the North's somewhat hermetic academic world. This is a good sign for the future. It entitles us to express the hope that the discussion begun over Southern theories will fall on the fertile ground of scholarly enquiries and that the words of Michael Barratt-Brown—'[...] imperialism is still the strongest force in economic, political, and military relations, with the help of which less economically developed countries are subordinated to more developed ones. We must still await its conclusion' (Brown 1970: viii)—will become out-of-date.

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