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**ВІСНИК ГУМАНІТАРНОГО НАУКОВОГО ТОВАРИСТВА:
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Збірник наукових праць «Вісник гуманітарного наукового товариства» є періодичним науковим виданням, що висвітлює актуальні питання гуманітарної безпеки та розвитку суспільства в умовах динамічних змін ХХІ століття. Видання акумулює науковий доробок з історії України, психології, педагогіки та державного управління, інтегруючи досвід подій російсько-української війни.

Пріоритетом Вісника є публікація досліджень, що сприяють формуванню національної ідентичності та професійної етики фахівців служби цивільного захисту. Видання адресоване науковій спільноті, практикам, здобувачам вищої освіти та широкому колу читачів, зацікавлених у розвитку гуманітарної думки.

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I. WALLERSTAIN'S CONCEPT IN THE CONTEXT OF THE OPPOSITION BETWEEN «MODERNIZATION THEORY» AND «DEPENDENCY THEORY»

The authors highlight the essence of the main conceptual positions of the famous American sociologist and political scientist, one of the founders of the theory of world-system analysis, and public intellectual Immanuel Wallerstein. It has been established that the basis of I. Wallerstein's paradigm is the thesis about the identity of capitalism and the global economy. The scientific achievements of the scientist were assessed from the point of view of the main trends in the development of world geopolitical thought at the present stage.

Keywords: *globalization, world-system analysis, dependency theory, modernization theory.*

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КОНЦЕПЦІЯ І. ВАЛЕРСТАЙНА У КОНТЕКСТІ ПРОТИСТОЯННЯ «ТЕОРІЇ МОДЕРНІЗАЦІЇ» І «ТЕОРІЇ ЗАЛЕЖНОСТІ»

Авторами висвітлено сутність основних концептуальних положень відомого американського соціолога й політолога, одного з фундаторів теорії світ-системного аналізу, публічного інтелектуала Іммануїла Валерстайна. Встановлено, що в основі парадигми І. Валерстайна лежить теза про тотожність капіталізму й глобальної економіки. Здійснено оцінку наукового доробку вченого з точки зору основних тенденцій розвитку світової геополітичної думки на сучасному етапі.

Ключові слова: глобалізація, світ-системний аналіз, теорія залежності, теорія модернізації.

No theory, no matter how deep and thorough it may be, can encompass all the diversity and complexity of the surrounding reality. The present opens up many new opportunities, but only as the flip side of the crisis shifts in the structure of the world economy. The enthusiasm of the 1990s, caused by illusions about the victory of liberal democracy, which would put an end to the socio-cultural evolution of humanity (as the American philosopher and political economist Francis Fukuyama insisted on at the time) [1], contributed to the dominance of the so-called modernization theory in the scientific discourse.

In general terms, the essence of the theory of modernization is to interpret history “as a universal transition of humanity from traditional (agrarian, pre-industrial) to modern (industrial, post-industrial) society” [2]. The theory is closely related to the concept of Eurocentrism (Westernization) as the basis for the all-encompassing unification of humanity. In this regard, it is worth adding that modernization in the sense of scientific and technological progress is a direct consequence of the permanent deepening of the division of labor characteristic of market models, and thus can be considered as the reverse side of the capitalist system. All other interpretations of the term are somehow related to the above definitions [3], [4].

At the same time, some modern researchers draw attention to the fact that the theory of modernization, focusing the attention of scientists on global processes, loses sight of the specifics of the functioning of local communities [5]. Sometimes there are even more frank remarks: they say that active modernization, despite all the advantages for the world economy, does not generally reduce the gap between the underdeveloped countries of Asia, Africa, and Latin America and the advanced countries of the West (which also include Japan, Australia, and New Zealand) [6, 35]. In other words, the modern capitalist economy, while representing, on the one hand, the evolution of production technologies, on the other hand, remains a constant hierarchy of economic zones.

One of the prominent representatives of alternative scientific thought, critical of universalist trends, was the American sociologist, political scientist

and philosopher, founder of the theory of world-systems analysis, Immanuel Wallerstein. Actually, the purpose of this research is to compare the views of the scientist with existing sociological schools centered around two polar theories – the theory of modernization and the theory of dependence.

Given the theoretical nature of the research, theoretical methods of cognition were used in the work on the topic, namely, analysis and synthesis, induction and deduction. In addition, since it was a question of studying the scientific work of I. Wallerstein, specific methods of historiographic studies were involved, such as historical-genetic, historical-systemic, comparative-historical, retrospective, diachronic, etc.

And so, to begin with, a few words about the life and creative path of the hero of our story. As the omniscient and omnipresent Wikipedia attests, Immanuel Maurice Wallerstein (September 28, 1930, New York – August 31, 2019, New York) was an American economic historian, best known for his developments in the field of sociology and the world-systems approach. He was a senior fellow at Yale University from 2000 until his death in 2019 and published regular commentary through Agence Global on world affairs from October 1998 to July 2019.

I. Wallerstein began his career as an expert on postcolonial Africa. The young scholar chose this topic after participating in international youth conferences in 1951 and 1952. In the early 1970s, he changed the direction of his scholarly pursuits and gradually gained recognition as a historian of the global economy and a theorist of “anti-systemic movements.” According to Wallerstein himself, this turn of events occurred as a result of the student revolution of 1968, which made a great impression on him.

The historian’s critical attitude towards the prospects for the development of the world capitalist system made him a leader of the anti-globalization movement in modern American sociology, and at the same time, an object of harsh criticism from competing scientific forces. Wallerstein’s main work, “The Modern World-System,” was published in four volumes: 1974, 1980, 1989, and 2011 [7].

Having thus concluded the biographical background, we must finally move on to considering the conceptual provisions of Immanuel Wallerstein’s theory. Oddly enough, a starting point for such studies can be an excerpt from a popular science book by the British writer, journalist, and historian, a representative of the conservative-liberal school, Niall Ferguson. In his best-selling book “Civilization: How the West Became a Success” (London, 2012), Ferguson quotes the following words from the 18th-century French philosopher Charles Louis de Montesquieu: “Asia, strictly speaking, has no temperate zone at all, and its countries, located in a very cold climate, directly face countries located in a rather hot climate... In Europe, on the contrary, the temperate zone is quite extensive... each country is very similar in its climate to its neighbor... It follows that in Asia the peoples oppose each other as the strong oppose the weak; warlike, brave and active peoples directly confront the enfeebled, lazy and timid peoples, so one of them inevitably becomes the conqueror, and the

other the conquered. In Europe the peoples oppose each other as the strong oppose the strong... This is the great reason for the weakness of Asia and the strength of Europe, the freedom of Europe and the slavery of Asia...” [8, 55-56].

According to Wallerstein, the history of humanity was a rivalry of local world-systems (world-empires and world-economies) until the conditions arose in Western Europe for the formation of a fundamentally new competitive environment and the European world-system became dominant: “The world in which we are now living, the modern world-system, had its origins in the sixteenth century. This world-system was then located in only a part of the globe, primarily in parts of Europe and the Americas. It expanded over time to cover the whole globe. It is and has always been a world-economy. It is and has always been a capitalist world-economy” [9, 56].

In effect, paraphrasing Charles Louis de Montesquieu, I. Wallerstein argued that over a long period of time, economic systems periodically emerged in different parts of the world, which, in the face of geographical and climatic contrasts, either collapsed or, by force of arms (cruel nomads came from the cold steppes), transformed into super-empires. And only in the specific conditions of the Euro-Atlantic region has no geopolitical entity ever managed to create a single political or cultural center. Instead, the unity of the structure began to ensure the efficiency of the division of labor: “And this efficacy is a function of the constantly expanding wealth that a capitalist system provides” [9, 57].

The capitalist system, according to Wallerstein, is identical to the world economy and represents a common market and a plurality of nation-states. This plurality is needed by capitalists to manipulate the interests of states and the differences in conditions ensured by the existence of countries with different potential and internal rules. “Only the existence of a multiplicity of states within the overall division of labor assures this possibility” [9, 57].

It is noteworthy that the market in Wallerstein’s vision appears in two essential manifestations: as a specific local platform for the exchange of goods and services, and as a global virtual phenomenon. “This complete virtual world market is a reality in that it influences all decision making, but it never functions fully and freely (that is, without interference).” Following Fernand Braudel, Wallerstein insists that “The totally free market functions as an ideology, a myth, and a constraining influence, but never as a day-to-day reality” [9, 58].

The author of “The Modern World-System” makes a paradoxical conclusion: capitalism cannot exist without a market and, at the same time, cannot exist in conditions of a completely free market. Capitalists insist on the need to “liberate” the market, but if this were to happen, they would not be able to ensure the growth of their own capital. And capital, as we know, is “self-increasing value,” “money that should bring in even more money.”

Wallerstein reveals the problem of the incompatibility of the free market with the interests of capital owners through a hypothetical assumption: what if there really were “a world market in which all the factors of production were totally free, as our textbooks in economics usually define this – that is, one in

which the factors flowed without restriction, in which there were a very large number of buyers and a very large number of sellers, and in which there was perfect information (meaning that all sellers and all buyers knew the exact state of all costs of production)”? In such an “ideal” market, buyers would be able to “knock down” the price indefinitely, which would quickly lead to the closure of production facilities due to lack of profitability [9, 58].

In fact, as follows from the further reflections of the American sociologist, the goal of any entrepreneur is not the market, but monopoly, since only a monopoly position can guarantee profit. Of course, there are no “perfect” monopolies, just as there are no “perfect” markets. There are oligopolies or “quasi-monopolies” in Wallerstein’s terminology. But here the question immediately arises: who or what can guarantee the “inviolability” of the rights of monopolists? The answer is simple, although sometimes not obvious: it is the state. In fact, what is commonly called capitalism turns out to be not simply private ownership of the means of production, but an extensive system of relationships between capital and its constraints, the foremost among which is the plurality of nation-states. As Wallerstein himself emphasized, “What sellers always prefer is a monopoly, for then they can create a relatively wide margin between the costs of production and the sales price, and thus realize high rates of profit. Of course, perfect monopolies are extremely difficult to create, and rare, but quasi-monopolies are not. What one needs most of all is the support of the machinery of a relatively strong state, one which can enforce a quasi-monopoly” [9, 58].

The author then discusses specific mechanisms for building quasi-monopolies, such as the patent system. Despite the fact that patent rights are often violated and their term is essentially finite, the introduction of this institution allows owners of innovations to make their product the most expensive on the market. There are other ways in which powerful states can create and maintain quasi-monopolies. These include various protective measures (import and export restrictions), state subsidies, state procurement and, finally, direct or indirect pressure on weaker states to stop attempts to pursue counter-protectionist policies [9, 58–59].

However, the main content of Wallerstein’s concept is not to state the facts of great-power protectionism, but that the profitability of business is determined by the degree of monopolization. In other words, the extreme points on the scale of the global division of labor are monopoly and competition. Accordingly, the world economy is a structure within which the “core,” “semi-periphery” and “periphery” are distinguished. At the same time, “core” production processes mean those that are controlled by quasi-monopolies, and “peripheral” ones mean those that are actually competitive. “When exchange occurs, competitive products are in a weak position and quasimonopolized products are in a strong position. As a result, there is a constant flow of surplus-value from the producers of peripheral products to the producers of core-like products. This has been called unequal exchange” [9, 60].

Since quasi-monopolies need protection from the state apparatus, they usually locate their assets in the territory of a few strong states. Instead, peripheral processes are usually dispersed among many weak states, creating the basis of local economic complexes. Thus, Wallerstein records a direct correlation between the geographical location of capital, the monopolization of production, the economic differentiation of countries and regions, and the strength of political regimes. Or, as the author himself puts it, “for shorthand purposes we can talk of core states and peripheral states, so long as we remember that we are really talking of a relationship between production processes” [9, 60].

Of course, over time, advanced technologies lose their relevance, new production processes eventually cease to provide high profits to capital owners and begin to gradually “spread” to the periphery. But this in no way affects the structure of the world economy and does not change the places (at least for now) of the “core,” “semi-periphery” and “periphery.”

At this point, it is worth emphasizing the correlation of the views of the American sociologist with the main provisions of the so-called “dependency theory,” which was first formulated by the Argentine economist and statesman Raúl Prebisch in the late 1950s. The theory gained popularity in the 1960s-1970s. And this is not surprising, since it was precisely in the late 1960s – early 1970s that the momentum of post-war reconstruction faded and the first signs of stagnation appeared.

Briefly, the essence of the theory is to substantiate the thesis about the low level of development as a result of the country’s peripheral position. Underdeveloped countries supply cheap labor and raw materials to foreign markets. These resources are purchased at low prices by developed countries, transforming them into high-tech products. Poor countries purchase finished goods at high prices, depleting their own capital, which, under other circumstances, could be spent on self-development. “The result is a vicious cycle that perpetuates the division of the world economy between a rich core and a poor periphery” [10].

Wallerstein significantly supplements the initial version of the dependency theory with a critique of classical Marxism, or rather, the formational division of world history introduced by K. Marx and F. Engels. Using the example of Latin American countries, the scientist proves that feudal exploitation of peasants in the region perfectly coexists with the capitalist division of labor within the global system. “If within a capitalist world-economy we define one stage as feudal, a second as capitalist, and a third as socialist, then and only then can we pose the question: can a country ‘skip’ from the feudal stage to the social stage of national development without passing through capitalism? But if there is no such thing as ‘national development’ (if by that we mean a natural history) and if the proper entity of comparison is the world system, then the problem of stage skipping is nonsense. If the stage can be skipped, it isn’t a stage” [11, 4].

Against the background of this assumption, Wallerstein formulates his main conclusion: capitalism is not a capitalist mode of production, but a world economy that was formed as a result of the involvement of regions with different systems in the market system of Western countries, which did not turn into world empires, although this is exactly what happened in the past, but remained nation-states [11, 1–6]. Or, to put it very briefly: “Capitalism and world-economy – are obverse sides of the same coins” [11, 6].

On the external contour of the international division of labor, all countries appear as capitalist. Internally, each has its own structure – from highly developed technological democracies of the West to Latin American latifundia and tribal systems with elements of slavery in Africa. In this regard, the political division of the world into separate nation-states highlights the problem of the essence of nation-building as a separate issue.

Supporters of modernization theory view the evolution of political institutions as a natural and therefore universal development from simple to more complex forms. The evolution of state formation began with control over tribes and city-states and later rose to modern systems of governance – nation-states. It must be admitted that such an approach is quite right: for legitimate functioning in the conditions of the modern Westernized world, communities must be formed as nation-states of the Western model [12, 21]. Only in this way can they claim official recognition from major global players, primarily the United Nations.

However, the downside of implementing this principle in practice was the appearance in the international diplomatic dictionary of such an unpleasant term as “failed state.” The term became popular, on the one hand, due to the “emergence” of quasi-state entities such as ISIS (Islamic State of Iraq and the Levant) onto the geopolitical surface, and on the other hand, due to the established system of international relations that made dismantling even completely incompetent states a rather troublesome task [13, 160].

If we accept the existence of this “reverse side” as an objective fact, then it is also necessary to recognize the uniqueness of the European experience in building state structures. That is, nation-states are not a general rule, but due to a certain coincidence of circumstances, it was this model of organizing power that ensured the unity of the global economic system.

Finally, we must reiterate our initial thesis that no single theory can explain all the complexity of the world around us. However, as the famous British statistician George Box said, “all models are wrong, but some are useful” (taken from the popular science book by Fry H. *The Mathematics of Love: patterns, proofs, and the search for the ultimate equation*. London, 2015). In this regard, I. Wallerstein’s criticism of the classical Marxist doctrine of socio-economic formations allows us to identify much more precisely the essence of the phenomena and processes of modern geopolitics. Let us recall the main points of his concept:

- firstly, capitalism, from the researcher's point of view, is not a capitalist mode of production, but a world economy that was formed as a result of the involvement of regions with different systems in the market system of Western countries;
- secondly, the modern world economy is a hierarchy of national communities, within which a distinction is made between the “core,” “semi-periphery” and “periphery”;
- thirdly, the scientist considered the basis of the specified hierarchy to be the division of countries into zones of high and low added value, which is directly related to the monopolization of production processes: the higher the monopolization, the higher the profitability;
- fourthly, on the external contour of the international division of labor, all countries appear as capitalist, on the internal one – each has its own structure and technological system.

Wallerstein's ideas generally correlate with the positions of the dependency theory and contradict the positions of the modernization theory. However, both theories have their strengths and weaknesses. The countries of the so-called periphery, despite all efforts, never joined the “core.” However, no one will deny that the level of technical capabilities and the standard of living of many of them is constantly increasing.

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LARGE-SCALE SPECIALIZED RESIDENTIAL COMPLEXES WITH INTERNAL INFRASTRUCTURE: IDENTIFICATION CRITERIA AND A PILOT CASE CORPUS

The article proposes identification criteria for large-scale specialized residential complexes with internal infrastructure as an independent analytical unit. These formations are distinguished from the conventional microdistrict, cottage settlement, and housing quarter by spatial integrity, access regulation, internal governance, service saturation, and agglomeration embeddedness. A pilot case corpus from Kyiv and Kyiv Oblast is used to compare innovation-developer and donor-humanitarian formations. The analysis demonstrates that declared autonomy should be treated as a hypothesis and tested through the actual functioning of infrastructure, services, territorial-use rules, and forms of