



Paradigmatic sketch of modernization theory. A perspective from the theory of development

Croquis paradigmático de la Teoría de la Modernización. Una perspectiva desde la economía del desarrollo

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Abstract

This article aims to analyze the concept of modernization understood as the closing of the gap between tradition and modernity, seeking to imitate the industrialized countries. The most prominent authors who study this topic are Walt Rostow (stages of growth), Talcott Parsons (social action), Arthur Lewis (dualism) and Simon Kuznets (structure of capitalism). Based in these authors, it is evaluated by the growth stages are impacted by the investment-saving, the Trickle-down and the reversed \bar{U} of Kuznets. Due to limitations of space, other pioneers are proposed at the end to continue with a formative research.

Keywords: *Growth stages, Trickle-down, Dualism, \bar{U} inverted, Poverty.*

Resumen

Este artículo pretende analizar el concepto de modernización entendido como el cierre de la brecha entre tradición y modernidad, buscando imitar a los países industrializados. Los autores más destacados que abordan esta temática son Walt Rostow (etapas del crecimiento), Talcott Parsons (acción social), Arthur Lewis (dualismo) y Simon Kuznets (estructura del capitalismo). Basados en estas fuentes, se evaluarán las etapas del crecimiento que son impactadas por la inversión-ahorro, el Trickle-down y la \bar{U} invertida de Kuznets. Por limitaciones de espacio, otros pioneros se proponen al final para continuar con una investigación formativa.

Palabras Clave: *Etapas de crecimiento, Trickle-down, Dualismo, \bar{U} invertida, Pobreza*

Introduction

The Theory of Modernization is a proposal of intellectuals such as Talcott Parson, Walt W. Rostow, Arthur Lewis, Simon Kuznets to confront communism starting in the 1960s, since they considered that modernization and economic growth could generate development and prevent countries from falling into the orbit of Marxist dystopia. It is a valid contribution for its time, but it is far from the paradigm of sustainable development, thermoeconomics and the circular economy of the 21st century.

Target

The objective of this paper is to explain the fundamental premises and contributions of the Modernization Theories (1940-1970) such as the stages of growth, investment-savings impacting economic growth, the Trickle-down and Kuznets' inverted U.

Methodology

Fundamentally, a bibliographic review was made of the main authors and their works (using the primary source in the Luis Ángel Arango Library) that contributed to the construction of the Theory of Modernization.

1.1 Definition of the modernizing paradigm

The Theory of Modernization is the response to an ideological battle between western capitalism and communism that sought the loyalty of third world countries in the face of the failure to insert their economies into the global system; in particular, it is the setback or collapse of the model of import substitution by domestic production, while communism was a model that offered efficiency and speed (Subgerencia Cultural del Banco de la República, 2015).

The Theory of Modernization has a Darwinian heritage; in an analogy of biological evolution (simple to complex), social evolution is a passage from the traditional to the modern, i.e., it seeks to imitate the most developed societies in a linear vision of the modernizing process. This theory proposes two types of societies: traditional and modern. The traditional society presents a social dynamic of interpersonal relationships with emotional links, a high religious component, the population is concentrated in rural areas and the economy is based on agrarian sources and primary products; therefore, all of the above prevents the development of a capitalist market.

Modern society establishes relations of an impersonal and neutral nature; to achieve industrialization requires a change in values and social structures from the family to the State, which must be strong and stable. His critics complained about his Eurocentric outlook; and Samuel Huntington predicted that autocratic governments would be established as occurred in Latin America in the 1960s, with the exception of Colombia.

Professor Alvin So analyzes that the Theory of Modernization appears in the midst of three historical events:

1. Emergence of the United States as a power after World War II and implementation of the Marshall Plan that rebuilt Europe. According to George Kennan's approach of *containment and priority*, Asian countries such as Taiwan, Japan and South Korea benefited over Latin American countries.
2. Strengthening of the Soviet Union and construction of the Iron Curtain in Eastern Europe.
3. Disintegration of colonial empires in Asia, Africa and Latin America.

Modernization is a socio-economic process of industrialization and technification whose goal is modernity. It begins with the assumption of the United States as the first world power, the strengthening of Fordism that crosses borders, causing capitalism in Europe and Japan. Its main characteristics are:

- Differentiation of the political structure (social complexity)
- Secularization of political culture (democratization)
- Increase in the capacity of a society's political system (bureaucratization).
- Promotion of capitalist accumulation practices (growth and self-dependence).

Modernization leads traditional societies to changes in urbanization, industrialization, rationality, social differentiation, education, media extension, political development, among other aspects.

Political science professor Samuel Huntington, quoted by Bula (1994), summarizes the characteristics of the modernization process in nine: revolutionary, complex, systemic, global, slow, diverse phases, homogenizing, irreversible, progressive.

In the United States, academic research was supported by government and private agencies to interpret the reality of the Third World and to elaborate a theoretical framework that would show the development path required to improve their economic, social and political situation (Bula, 1994, p. 71).

The main assumptions of the Theory of Modernization are based fundamentally on conceiving modernization as a process that takes place through stages (Reyes, 2007). According to Rostow's theory of economic development, there are five stages for a particular society. Summarizing them, they are: (i) the traditional society; (ii) precondition for take-off; (iii) the process of take-off; (iv) the road to maturity; and (v) a society of high mass consumption.

These stages were proposed in the creation of the Alliance for Progress in Punta del Este (Uruguay) in 1960 with the purpose of avoiding communist governments in Latin America. The idea

The central idea was that if countries needed investment, it could be provided to them in terms of aid in capital, technology and experience. After that conference, whose worldview was extended to Latin America, this continent would propose the Dependency Theory, whose authors included Andre Gunder Frank, Raul Prebisch, Celso Furtado, Theotonio Dos Santos, Ruy Mauro Marini and Fernando Henrique Cardoso.

1.2 Conceptual alterations and transformations

Criticisms have been made of the Modernization Theory. For example, the existence of an entrepreneurial elite capable of facing problems is fundamental; the difference between the traditional and the modern is a gross simplification because they are not mutually exclusive characters; likewise, political changes are required; furthermore, the particularities of societies such as culture and their own values must be taken into account. All these arguments are a critique of the linearity and Westernism of the paradigm.

In the 20th century, the Theory of Modernization can be referenced with Immanuel Wallerstein and his *world-system* that determines the tendency towards globalization without having resolved social inequalities and risks. Many of these explanations are taken up by anti-globalization and ecologist movements, and derive in aggressive theses against capitalism in the hands of Michael Hardt or Antonio Negri. In the 21st century, in so-called postmodernity or reflexive modernity, sociologists such as Ulrich Beck pose problems for contemporary modernity such as the crisis of labor, the ecological crisis, feminism, and call for an end to neoliberalism and even capitalism.

Thus, in the face of the collapse of the East-West world order there have been hidden but quasi triumphant attempts to renew the pretensions of the doomed European Enlightenment. Moreover, as Beck puts it, the dangers of industrial society dominate public, political and private debate and conflict; industrial society is seen and criticized as *a risk society*. It is no longer possible to think in terms of linear growth models; there is an institutional crisis of industrial society, therefore, it is necessary to rethink society so that it becomes reflexive (1999, p. 32).

In order to evaluate Modernization Theory, the contributions of Walt Whitman Rostow, Talcott Parsons, William Arthur Lewis and Simon Kuznets will be synthesized below.

1.3. Contributions of Walt Whitman Rostow

Rostow was an American economist and politician (1916-2003), referenced for his opposition to communism and convinced of the efficacy of capitalism and free enterprise. He was a Harvard professor, economic historian, member of President Kennedy's *brain-trust*¹. In 1960, he collaborated with the presidential campaign of then Senator John F. Kennedy, highlighting his ability to convert rigorous academic concepts into terms accessible to the electorate uninitiated in political-economic issues; his were slogans such as Let's get the country moving, or the new frontier, the decade of development.

¹ It is a group of renowned economists, lawyers and academics who act as advisors to the president; it is a group of experts, of brains. It is literally brain trust.

In early 1961, President Kennedy appointed him number two on the National Security Council (later Lyndon Johnson chose him as his National Security Advisor: 1966-1969), and at the end of that year he was appointed Chairman of the Policy Planning Council, the State Department's main strategic support. Between 1964 and 1966, Rostow served as a member of the Inter-American Committee of the Alliance for Progress with the rank of Ambassador. He was an academic who mixed his academic and writing activities with high-level political work.

Although he appears as the creator of a current that seeks to explain long-term economic transformations with capitalist arguments, in order to confront Marxism, the origin of his thinking is based on the German historical school. However, as Gutiérrez (2004: 295) puts it, Rostow's written academic production is not only of great importance in the field of economic history, but also in that of economic development, leading sectors, technological development and demographic growth. It should be noted that his central concept is Stages of economic growth, a subject on which he published articles and books.

1.3.1. Contribution to economic history

The aim of Rostow's work - according to his words in the introductions to his books - is to apply economic theory to economic history, and to understand the interrelationships that economic forces have with other ideologies, whether social, political or cultural, that are present in societies. An example of this contribution is his work *The British Economy in the Nineteenth Century*, which contains essays on economic cycles, long-term trends such as the Kondratieff cycles, and the link between social, political and economic forces.

Rostow considered that the optimal unit for the study of economic history was not the nation, but the commercial area formed by different countries, so that conventional macroeconomics seemed to him to be limited. For this reason, he elaborated a matrix that would make it easier to analyze something beyond what monetary and Keynesian theories allow; in the aforementioned mold he included aspects that were not explained by economic theory, such as innovation or invention.

In the 1950s, issues related to innovation were too vague for economists who were concerned with quantifying them by means of equations and models; they were a chimera. It was the Nobel Prize winner Robert Solow who was the first to obtain and succeed in capturing these concerns in a model of economic growth that he published in 1957, in which he associates technical progress with the aggregate production function.

Without departing from the subject, Solow's model of economic growth is a long-run model that explains how variables affect growth, the key factor of which is technical progress that determines the real wage; it is a dynamic model in which savings play an outstanding role, and technological innovation counteracts diminishing returns, even with a fixed amount of capital and labor. Since increasing inequality is an undesirable effect of economic growth, it can be counteracted by investment in human capital.

In any case, it is worth noting that Rostow's major contribution is the theory of stages.

The following is a background analysis of the growth of the company, which will be analyzed in the following paragraphs.

1.3.2. Background of the stages of growth theory

The stages of economic growth are a fundamental contribution of Ros-tow's theory and, although he never mentioned it, the evolutionary origin of his hypothesis or conjecture is the German historical school, which served him to confront the stages of Marxism.

As noted by Brue and Grant (2009), this school emerged from 1840 with the publications of Friedrich List and Wilhelm Roscher, and ended in 1917, when Gustav Schmoller died (p. 195). The four basic principles in the thinking of German historical economists were: evolutionary approach to economics, emphasis on the positive role of government, historical/inductive approach to generalize on laws of development, and defense of conservative reserve.

Hoseltiz points out that among the economists who developed the theories of economic stages, some belonging to this school have stood out. He then goes on to explain that the stages model was expounded by several economists of that country in the 19th century, particularly Friedrich List, Bruno Hildebrand, Karl Bücher, Gustav Schomeller and Werner Sombart (Hoseltiz, 1964, pp. 289-291). The aim of these authors was to try to discover the laws of development of national economies, although they differed in the methods to be used for the discovery of these laws, and in the hope that such rules or precepts could be expressed with some degree of precision.

In assessing the role assigned to the laws of economic evolution, three approaches can be distinguished that can be glimpsed from the various interpretations of human progress in the writings of the philosophers of the seventeenth and eighteenth centuries:

- The principle of economic evolution as analogous to organic life, put forward by Wilhelm Roscher, economies grow, mature and decline.
- Economic development is an aspect of the general trend of the progress of human culture, suggested by Karl Knies.
- Realized economic growth is the succession of higher and higher stages of economic organization, as outlined by Bruno Hildebrand.

By way of example, cited by Hoselitz (1964, pp. 296 and 314), the detailed examination of List's classification establishes five stages: a) the savage, b) the pastoral, c) the agricultural, d) the agricultural and manufacturing, e) the agricultural, manufacturing and commercial. But the most popular and discussed theory of economic stages is the one elaborated by Karl Bücher, who proposes three stages: a) independent household economy, b) city economy, c) national economy.

From another point of view, it can be observed that Marx presented four stages: medieval society, capitalism, socialism and communism. Rostow's theory, then, is a response to Marx's proposal.

1.3.3. *Contribution to the theory of economic development*

In the 1950's, Rostow undertook the theory of economic development at a time when development was assimilated to economic growth. At that time, a dynamic theory of the growth of the world economy took shape, which forced the United States to confront the socialist bloc with a position on the process of modernization in the developing world. Rostow sought to clarify and interpret, through a long-term alternative, the development process proposed by Karl Marx in the 19th century, and even to elucidate Joseph Schumpeter's *Capitalism, Socialism and Democracy*.

In relation to Marx, this German philosopher and economist positioned the class struggle as the axis of the evolution of the capitalist system, which traversed history from feudal society to communism, crossed by capitalism and socialism. Class struggle is a concept that explains the existence of social conflicts as the result of antagonism inherent in any politically organized society between the interests of different sectors or social classes. Marx says that the decisions of a society are simply a function of who owns the property.

For his part, Schumpeter -who as a young man had not agreed with Marx's concept of historical materialism-, at the end of his life, considered that the power of large companies would progressively lead to corporativism and the domination of large conglomerates, under the model of imperfect competition, with oligopolistic or monopolistic structures. In this way, capitalism would give way and its destruction would allow the construction of a more egalitarian world under a democratic regime. In short, in addition to creative destruction and the theory of cycles, there is a pessimism about capitalism on the part of the aforementioned author.

On the other hand, Rostow analyzes Marx's and Schumpeter's approaches with reservations, stating that history should not be observed with a fatalistic perspective, since it cannot be written solely on the basis of the struggle of opposites. He asserts that capitalism is the least imperfect form of organization, and that as an economic-social organization it is designed or proposed to generate increasing profits in the long run.

There are two books that synthesize Roston's thinking on growth: *The Stages of Economic Growth* (1961) and *The Process of Economic Growth* (1967). To these works is added the vision of economic growth and its relation to the scientific revolution.

1.3.3.1. *Stages of economic growth*

In *The Stages of Economic Growth* (1960), it is stated that underdevelopment is only a precursor stage of development, since all the developed countries of today were underdeveloped in the past; moreover, the geographical location of each one, or the time of the beginning of the stages, would have no influence on the capacity of a nation to pass through or successfully pass through them and reach development.

Rostow proposes a conception of modern history that could replace the sea theory.

xist (1960, pp. 57-70), arguing that all societies would go through five phases that can be summarized as follows:

- *Traditional society.* Production increases as a function of the greater consumption of productive factors or inputs, but without an increase in total factor productivity. It is a type of pre-Newtonian society that lacks scientific and technological developments where innovation is sporadic and disjointed, so that its contribution to the improvement of the living conditions of citizens is almost nil; or in some cases, the possibilities of science are not applied in production.

In this stage, there is production for self-consumption and barter. Examples of this type of society are the dynasties in China, the civilizations of Mesoamerica and the Mediterranean, and medieval Europe, where the political organization is hierarchical and there are no laws regulating property.

- *Conditions prior to the impulse.* Transitional stage that increases the specialization of labor and the economic surplus. Important elements that were previously unnoticed, but which play a fundamental role in economic growth, such as national dignity, general welfare, education, entrepreneurship, savings, risk-taking, the expansion of trade and the use of new production methods in manufacturing companies, are important in this process.

However, there is low productivity, and the pace is very slow, due to outdated values and political institutions that do not have a national character. However, the greatest progress is political, due to the construction of a State founded on nationalist elements that oppose the capture of the State by traditional groups with respect to land ownership.

An example of these societies in transition is Western Europe between the end of the 17th century and the beginning of the 18th century, a few years before the Industrial Revolution, which began in the second half of the 18th century. It was a phase of the greatest economic, social and technological transformations since the Neolithic period, occurring in the United Kingdom and extending to much of Western Europe and the United States, ending between 1820 and 1840; this period saw the advance from an economy based on agriculture and commerce to an urban, industrialized and mechanized economy.

- *The initial impulse.* Economic take-off where industrialization is increased, and the income reaches 10% of GDP. In this phase, the national product grows progressively at higher rates than the population, which implies a permanent improvement in per capita income. From this point on, the compound interest formula applied to long-term growth makes sense. Its duration would be 20 years.
- *Road to maturity.* The economy is diversified, investment is made in technology and the production of goods and services increases, which reduces dependence. It is a long interval of pro-

sustained growth. Investment represents between 10% and 20% of national income. With improved technology, the development of new industries is accelerated, and the economy is inserted into international markets through trade flows, exporting its surpluses and importing those products that increase the population's welfare. Its duration was established at 40 years.

- *Large-scale consumption.* This period is one of high mass consumption, where societies at a certain point in time move towards the consumption of durable goods and services. As an example, Rostow highlights the mass consumption of household appliances and the automobile, whose production is fundamental in the endless assembly line used by Ford.

There is, not in books, but in practice, a sixth stage that can be called Quality. Many companies, starting with the Japanese companies, have implemented just-in-time, total quality, quality circles, production by objectives and clusters to ensure quality in high mass consumption products.

1.3.3.2. *The economic growth process*

Rostow states that the objectives of *The Process of Economic Growth* are threefold: to formulate determinants of economic growth, to expose the dynamic process of growth, and to isolate factors that produce periodic repetition of economic cycles and the sequence of secular trends (1967, pp.27-34). In this work, he highlights the ideas of other economists who associated, during the 1930s, the predominant role of leading sectors in economic growth. These sectors have high capital formation, greater potential for economic growth and a high rate of technological innovation, so that they become the most important sectors of the economy.

In this book, Rostow also analyzes the link between leading sectors and economic growth. Quoted by Gutiérrez (2004), this American economist recalls the role of the cotton industry in the high growth of Great Britain between 1780 and 1840; but when this kind of manufacturing slowed down, leadership was concentrated in iron mining, driven by the domestic and foreign railroad industry during the 40s and 50s of the 19th century. This led to steel becoming the new leading sector in the 1960s and 1980s, followed by the chemical, electrical and light mechanical industries. Similar sequences occurred, albeit with some delay, in the United States, Germany, France and Russia (p. 300).

1.3.3.3. *Rostow's contributions to create a domestic market*

Given that the current growth paradigm calls for the need to open borders and strengthen international trade, Rostow's proposal to create a national market is curious.

In one of his speeches, he points out that there are regions of Africa, Asia, and even some of Latin America, which are still quite primitive (1963, pp. 4-15). For Rostow, before he could initiate

In order to achieve a systematic, orderly industrialization, nations must go through a period whose decisive, crucial tasks are education, administrative capacity building, the construction of transportation infrastructure, the exploitation of energy sources, and so on and so forth.

- In the paper reviewed, which is a lecture given in New Orleans, Rostow compares the existence of imbalance between rural and urban communities, which can be synthesized by:
- Existence of a developed industrial capacity to substitute imports of certain consumer goods.
- The market for these items is small, with a tendency to decrease industrialization, once substitution has taken place.
- Despite agricultural developments, the gap between rural and urban life is widening.

As a result of these imbalances, people migrate from the countryside to the city lights. In the absence of industrial development, despite being a heavy burden on government budgets, they live in miserable conditions in shantytowns, slums and favelas.

The central thesis is based on how to create a national market. In the next decade, Rostow argues, the fundamental task should be to eliminate these structural imbalances, to promote agricultural and industrial expansion and to create national markets within countries. As part of a national strategy to build a national market, four main tasks were to be carried out, in which private enterprise would play an important role, not only by assembling or manufacturing goods and cars, but also by putting its manufacturing and marketing expertise at the service of the population. These tasks would be:

- Increase agricultural productivity.
- Revolutionize the marketing systems for agricultural products in cities.
- To turn the industry towards the production of simple equipment for agriculture and consumer goods for mass markets.
- Revolutionize marketing methods for this type of economic products, especially in rural areas.

1.4 Origin of the contributions of Talcott Parsons

Talcott Parsons (1902-1979) was an American scholar, considered an influential figure in 20th century sociology, belonging to the classical tradition of that discipline, and known for

mainly for his theory of social action and his structural-functionalist approach. After earning a Ph.D. in economics, he worked at Harvard University from 1927 to 1979, and in 1930 was among the first professors in the newly created sociology department.

Parsons' theory of social action was the first social systems theory developed in the United States with a broad, systematic and generalizable character. Parsons studied the works of Max Weber, Emile Durkheim, Vilfredo Pareto and Alfred Marshall, whose works influenced him in his theory of social action, in which he visualized the action of the will through cultural values and social structures that impose and compel choices and thus determine all social actions, as opposed to the idea that actions are determined on the basis of internal psychological processes.

Structural-functionalism is close to homeostasis, i.e., when imbalances exist in society, they self-regulate to achieve a new equilibrium. Although Parsons is generally considered a structural-functionalist, towards the end of his career he published an article in which he states that the terms "functional" and "structural-functionalist" were inappropriate ways of describing the character of his theory (Parsons, 1977).

On the other hand, as Fukuyama (2014) notes, in the 1950s and 1960s *modernization* theory was in full apo- gee, constituting perhaps the most ambitious attempt to formulate in American science a comprehensive empirical theory of human social change (pp. XIII,XIV).

Modernization theory has its origins in the works of late 19th century European social theorists such as Henry Maine, Emile Durkheim, Karl Marx, Ferdinand Tönnies and Max Weber, whose texts defined a series of concepts (e.g., status/contract, mechanical/organic solidarity, community/society, charismatic/bureaucratic/rational authority) that were intended to describe the changes in social norms and relations as social norms and relations change over time, mechanical/organic solidarity, community/society, charismatic/bureaucratic/rational authority) that were intended to describe the changes in social norms and relations as the transition from agricultural to industrial production took place in human societies. Although they were based on the experiences of early modernizing countries such as Great Britain or the United States, they aspired to formulate general laws of social development.

European social theory fell victim-both literally and figuratively-to the two world wars, but the ideas migrated to the United States, where they were taken up by American researchers after World War II in places like Harvard's Department of Comparative Politics, MIT's Center for International Studies, or the Social Science Research Council's Committee on Comparative Politics.

In the Harvard department, under the direction of Max Weber's disciple, Talcott Parsons aimed at the creation of a unified, interdisciplinary social science encompassing economics, sociology, political science and anthropology.

It was something similar to what Kenneth Boulding (1910-1993) would propose years later, when he spoke of the sociosphere, composed of the econosphere, the polysphere and the cultusphere. This economist was a creative integrator of knowledge and a masterful figure in the discipline of social sciences,

for whom economics and sociology were all aspects of a single social science devoted to the study of human beings and their relationships (organizations), which is why he spearheaded an evolutionary approach to the economic sciences.

Both Parsons and Boulding sought an integration of the social sciences as opposed to that presented by Gary Becker, who proposed an intellectual monopoly of economics by applying his methodology and epistemology to other areas of knowledge. Indeed, Becker worked with Milton Friedman on research that explained issues such as income, employment and minority prejudice with the help of economic theory; he later received the Nobel Prize in Economics in 1992 for extending the domain of microeconomic analysis to a wider range of human behaviors outside the market, such as decisions to have children, marry, divorce, share housing and why people commit crimes.

It is worth noting that the theoretical debate at the time of Parsons' academic activity at Harvard was the object of the social sciences, the fundamental question being the affectation of scientific research in methodological and epistemological aspects. His answer was a general theory of society as a whole with predictive and explanatory capacity. Undoubtedly, in the face of this type of generalization, the question arises as to what was the role of the individual vis-à-vis supra-entities? If we bear in mind functional structuralism, according to which individuals are immersed in cells of the social structure that are determinant, then where is the individual decision?

For his theory, Parson assumes theoretical positions of other sociologists. From Durkheim, he adopts the definition of society as a system; from Weber, he embraces the concept of social action, which is culturally referenced behavior; from Freud, he assumes the concept of it as a natural tendency of the organism, the superego as something ideal, and the ego as part of it modified by education and culture, since he considers that the *malaise of culture* presents society as a repressor of instincts; from Bertalanffy, he adopts the General Theory of Systems and ordering.

1.4.1. Phases of the Parsonian theory

Parsons evolves in his theory. Supported by Domínguez (2008, p.134) and Girola (2010, p.170), there are four phases of his theory:

He synthesizes a general theory in the image of classical mechanics to explain and predict individual and social behavior. From this period is his book *The Structure of Social Action* (1937), which can be considered his most important contribution. In the text, he seeks a general theory of social action, discovering new facets in the thought of Durkheim, Pareto, Weber and Marshall to consider that social action is a creative process, different from behavior, which is a mechanical response.

According to Parsons, through the monocle of cultural values and structures, choices are constrained and actions are determined, contrary to the idea that actions come from internal psychological decisions. Based on Weber, he emphasizes the voluntarism of social life; and reading

a Durkheim introduces social norms to solve the societal order. From Pareto, he discovers the notion of system, and from Marshall, he takes the individualistic perspective of systems.

This work studies the trilogy utilitarianism-positivism-idealism, including the errors of these positions. Of utilitarianism, he recognizes its excessive emphasis on the individual and rational character; of positivism, its biological reductionism, the only means of knowledge being experience ascertained through the senses; of idealism, he asserts that it exaggerates the spiritual sphere of the human being. Probably, trying to contribute to the sociological aspect of development, Parsons neglected the psychological aspects; but as he himself expresses it, the direction of the text is the elaboration of refined theoretical models of structural-functional analysis, including motivation and its relation to culture (1937, pp. 17-27).

The functionalism-structuralism of the text establishes that societies tend to self-regulation and the interconnection of values, goals and functions; self-sufficiency is determined by basic needs: preservation of social order, supply of goods and services, education for socialization and protection of children. For Parsons, the act as a unit has four elements: an end, the actor, the action, values and norms; and that social organization influences the actors. This work, his most important, is an ambitious project of systematization of social action.

Phase 2. Linking history with culture and society. His book *The Social System* (1951) dates from this period. Aware of the difficulties encountered, Parsons seeks an intermediate solution that leads him to structural functionalism, establishing a relationship between personality, culture and society; at that time he discusses processes of change and permanence within the historical perspective.

It is influenced by general systems theory, cultural anthropological theories, pragmatism and Freud's psychoanalysis. In this way, he is intellectually enriched and presents a new theoretical scheme based on trust in social norms and a functionalist perspective with emphasis on the interaction of social actors, and the division between system, personality, culture and the social. In addition, he wrote with Edward Shils the article "Motives, values and systems of action" in *Working papers* in 1953, which sought a general theory of action and the construction of a conceptual framework.

Phase 3. In this period (1950-1979), Parsons wrote with Neil Smelser *Economy and Society*, and two evolutionary systems texts: *Society and The System of Modern Societies*.

Girola reviews that Parsons deals with evolutionary change, that is, social change towards more complex forms of organization: that actors become responsible for the effective performance of functions; that organizations allocate resources to the most competent and responsible; that there is stratification in mass industrial society, concluding that equity and mobility is an evolutionary achievement (Girola, 2010, pp. 172-177).

Subsequently, in Parsons' work there is an evolutionary change in his paradigm, since in the mid-1950s there is a systemic turn, incorporating Gene Theory into his work.

Systems Theory (TGS) and cybernetics. Its explanatory instrument is the systemic needs scheme called AGIL, which can be summarized in four subsystems that are functional imperatives, as follows: Adaptation, Goal (achieving goals), Integration and Latency (enabling motivation).

Parsons (1977) defines the concept of human system of action, social system and society. The first is made up of the social, the behavioral, the individual (personality) and culture, elements that interpenetrate each other, whose functional categories are: integration, adaptation, reaching goals and maintaining patterns, respectively. The social system, on the other hand, is the interaction of human individuals, where the actor has goals, ideas, attitudes, and is the object of orientation for other actors as well as for himself (pp. 18-21).

Regarding society, in his famous book *Society: Evolutionary and Comparative Perspectives* (1974), his vision contrasts with the common idea of society as a unit composed of concrete human individuals; on the contrary, Parsons argues that the self-sufficiency of a society is a function of the combination of its controls over its environments and its own state of internal integration (pp. 21-24). Likewise, this sociologist considers that the core of a society as a system is the normative order, located within a pattern through which the life of the population is organized. Society as a whole contains particularized norms, culturally referenced rules to highlight meanings and legitimations, statutes, rights and obligations differentiated according to groups.

In *Society*, it is sketched that technological processes satisfy needs, and that the economy is an important element of society, being a complex of institutions that regulates employment, property and contracts (1974, p. 32).

By way of conclusion, Parsons outlines that society is the most relatively self-sufficient type of social system and, in the words of Roscoe Pound, *politically organized* (1974, p. 11). Self-sufficiency is related to normative control, economic priorities, motivational commitments, technological-organizational, political and hierarchical. The structural categories are values, norms, collectivities and roles.

This American sociologist states that social evolution is analogous to biological evolution, and by way of example is the capacity of social systems to adapt to a complex environment. In this regard, Girola (2010) outlines the elements that make up the paradigm of evolutionary change in Parsonian theory: increasingly complex processes of structural differentiation, adaptation to the environment, inclusion of sectors and groups in societal projects, and generalization of values (p. 177).

Regarding his theory of evolution, Parsons points out meta-theoretical principles that are not explicit, and meta-empirical principles, because there is no demonstration in history. In relation to the first, it is possible to discover in society not only regularities and recurrences, but laws of universal character that refer to institutional orders or mechanisms of change, and he also reiterates that progressiveness does not mean progress.

Phase 4. Creative conceptual construction. In this intellectual journey, Parsons devotes himself to the construction of creative concepts, to formalize conceptual problems, which was important

to build a theory of conflicts and social struggles of social evolution, contingency and collective mobilizations.

However, in Parsonian theory, contradictions and struggles are absent in its evolutionary conception that implies only improvement in cultural codes and adaptation. Although he criticizes cultural individualism and utilitarianism in the neoliberal conception, his paradigm does not confront conflicts, perhaps because it was written in the United States in the golden age of capitalism (1945-1970), at the height of Fordism, modernity and the welfare state.

Continuing with the conflict, Parsons proposes that class in the Marxist sense must be dis-cast by the weakening in advanced society of status, power, property rights (Duek, 2014). He then complements by explaining that stratification is sociology of consensus, and that certain inequality is necessary for the most important positions to be occupied by the most qualified (Parsons, 1959). The author argues that stratification in stable systems is a function of integration and ordering; furthermore, he argues that reward is proportional to merit in terms of status and prestige, and that the top of the system is broad and diffuse with top executives, high officials, scientists and renowned writers.

By way of conclusion, taking up Almaraz's (1981) summary, Parsons' work constitutes one of the most ambitious systematization projects undertaken in the field of Social Sciences. Its theoretical progression threads together, throughout the period of Sociology's greatest institutional and conceptual expansion, the main approaches of the social-scientific discussion of the 20th century: natural science-social science, theory-empiricism, conflict-consensus, causal treatment-functional treatment, statics-dynamics, and so on.

Parson's work addresses not only the fields of economics, psychology, cultural anthropology and modern philosophy, but also integrates contributions from physiology, biology, genetics, linguistics and the theory of information and communication. The result is a system of theory that aims to assume, from the scientific contemporaneity, the oldest veins of social thought.

1.5. Contributions of William Arthur Lewis

He is the only black Nobel Prize winner in Economics (1979) and was born in Latin America (Santa Lucia Island), considered one of the founders of development economics and economic growth. His theory can be summarized as follows: economic development must have a determining social function, which is why he includes elements from social psychology and sociology. As a result, Lewis defends the need for a harmonious and global expansion of all the economic sectors of a country, putting forward his famous model of dual sectors.

1.5.1. Dual sector model

A dual economy refers to the coexistence or concomitance of two independent and interrelated sectors within the same area, but with different levels of development,

technology, demand and supply patterns. One sector will be capital intensive and technologically more advanced; while the other sector will be more labor intensive and technologically primitive. The concept was originally created by Herman Boeke to describe the co-presence of modern and traditional sectors in a colonial economy.

Related to the above, Lewis wrote in 1954 a famous article entitled *Economic Development with Unlimited Labor Supply*, which can be considered as the most influential contribution to the establishment of development economics. This prize-winning work was written when he was rejected by the University of Liverpool and then accepted as an eventual replacement for the famous Professor Hicks at the University of Manchester (1946-1957).

The dual sector model (or Lewis model) analyzes the growth of a developing economy in terms of the labor transition, the capitalist sector and the subsistence sector (Blacutt, 2013, p. 39). It originates from the fact that, in the 1950s, theorists began to wonder why in underdeveloped countries there were so many idle natural and human resources, and why the state did not take action, Keynesian style. The question of the academic community of development experts gave rise to another proposal, this time by the English Lord Arthur Lewis, who suggested taking advantage of surplus labor to transfer it from agriculture to industry, and thus achieve a frank process of growth. His model was called Development with Unlimited Labor Supply.

As Clavijo (2007) explains, Lewis argued that the existence of dual economies could be used to boost development to the extent that the wage differential exceeded 30% and this would awaken a certain dynamic in the leading sectors (p. 69). This argument will be familiar to readers who remember *Currie's Plan Colombia or Pastrana's Four Strategies* (1970-1974); the origin of many of these ideas comes from Lewis who, in turn, drew on Boeke.

According to the theory, in underdeveloped countries there was a rural sector in which there was surplus labor, and all that had to be done was to summon capitalists to invest in industries, attracting redundant labor. This way of recruiting workers would be very simple: they would be paid something more than the subsistence wage and, since before going to the city the surplus workers earned practically no wages, the opportunity cost of moving to the urban centers tended to be zero.

1.5.1.1. *Dual model theory*

Lewis divides the economy of an underdeveloped country into two sectors, assuming a dual economy:

- A developing economy has a surplus of unproductive labor in the agricultural or subsistence sector.
- These workers are attracted to the growing manufacturing sector where higher wages are offered.

- Entrepreneurs make a profit because they charge a price above the wage rate.
- Profits will be reinvested in the business in the form of fixed capital.
- An advanced manufacturing sector means an economy that has moved from a traditional to an industrialized one.

1.5.1.2. Sectors and their relationship

Lewis defined two sectors: capitalist and subsistence. The former can be considered as that part of the economy which utilizes reproducible capital and controls the use of capital; it includes manufacturing, modern plants, mines, etc.; it can be private or public. The subsistence sector, on the other hand, is that part of the economy that is not using reproducible capital, or the self-employed workers in the sector.

The dual model sector is a theory of development in which surplus labor from the traditional agricultural sector is transferred to the modern industrial sector, whose growth over time assimilates surplus labor, promoting industrialization and stimulating economic development. In the Lewis model, the subsistence agricultural sector is characterized by low wages and abundant, low-productivity, labor-intensive labor. In contrast, the capitalist sector is recognized by relatively high wages in the agricultural sector, with higher marginal productivity and greater demand for workers.

The first relationship between the two sectors occurs when the capitalist sector expands and demands labor from the agricultural sector, which generates an increase in the per capita output of workers moving from the subsistence sector to the capitalist sector. Lewis assumes that the supply of unskilled labor for the capitalist sector is unlimited, allowing for the creation of new industries and the expansion of existing ones. Much of the unlimited supply of labor is made up of disguised unemployment in agriculture and service activities such as domestic, odd jobs and retail trade.

The agricultural sector has an unlimited amount of land to cultivate, and the marginal product of an additional farmer is assumed to be zero when the law of increasing marginal returns has come to an end because of the entry of more land; thus the agricultural sector has an enormous number of workers who do not contribute to its production, since its marginal profits are equal to zero. The relationship between the two sectors is that, because of the difference in wages between the capitalist and subsistence sectors, workers will tend to move or metamorphose from agriculture to industrial manufacturing to obtain the gratification and stimulus of higher wages.

1.5.2 Economic planning

In 1952, Lewis wrote the book *Economic Planning*. One of the questions he asked himself

was why it was important to plan He expressed that, like the swings of the pendulum, the powers of the state fluctuated between being too large or too small.

William Lewis points out that in eighteenth century England, the State over-regulated the economy, and there was an attack on the State led by progressives and resisted by conservatives; then, in the twentieth century, conservatives opposed planning, and the left, which advocated laissez-faire, denounced it (1952, p. 9). This means that both positions have been for and against the state according to circumstances.

For this economist, not even the greatest of laissez-faire apologists has ever suggested that there should be no state. The latter, Lewis asserted, has obligations with respect to:

- Institutions to which only the State can give strength or vigor, such as justice and national defense.
- Infrastructure for which beneficiaries cannot be taxed such as lighthouses for navigation.
- Situations and actions for which the State's judgment is superior to that of citizens, for example: number of years parents must send their children to school, bar and discotheque hours, propensity to save (1952, p. 13).

On the other hand, Lewis notes the weaknesses of laissez-faire as income not distributed equally (pp. 13-15). In relation to that planning compulsion, he sets out arguments against planning thus:

- Central planning cannot foresee all the consequences of its actions and guard against them.
- Planning by compulsion must be inflexible; once the plan is drawn up, it must be adhered to.
- The realization of the plan is imperfect, even if its design was perfect.
- Planning resembles the Procrustean act (pp. 18-22).

Therefore, Lewis in this work proposes to plan through markets; likewise, to preserve free markets; and for the State to plan not by compulsion, but by manipulation of the market. If the state wants more firms to produce more of the kind of goods that the poor buy and fewer of the kind that the rich buy, it should not establish more controls, but increase taxes on the rich and decrease taxes on the poor.

Lewis explains that price controls are a delicate instrument that can easily be misused because they can lead to general or partial shortages, the latter when one sector assumes that the price is too low.

The price control also affects quality, since producers use poor quality raw materials to increase their profits, which have been restricted by government intervention or control. In addition, price control affects quality, since producers use poor quality raw materials to increase profits that have been restricted by government intervention or control. When demand is greater than supply, black markets appear (1952, pp. 25-30).

1.5.3 Theory of economic development

In 1955, Arthur Lewis wrote *Theory of Economic Development*, in which he stated that every development process produces costs, including social and individual tensions, monopolies and excessive urbanization speed. In the preface to his work, he stated that the title is misleading if it is understood that there can be only one theory of economic growth. The factors that determine growth are very numerous, and each has its own set of theories. He goes on to say that there are different theories to study land tenure, the diffusion of new ideas, the growth cycle, population growth, government budgeting. For him, it would have been more appropriate to say *Theory of economic development*.

However, Lewis says that it would have been equally misleading to indicate that the book was intended to review everything written on economic development (1995, p. 7). Therefore, he explains that he has not constructed a theory, but a map that can be published at different scales, and where it is easy to get lost unless one has an overview of the subject. He illustrates that articles in technical journals correspond to a 1 inch per mile map, while his book is constructed at a scale of 1 inch per 100 miles.

According to Lewis, the last major work to cover this vast subject of study was in John Stuart Mill's *Principles of Political Economy*, published in 1848; thereafter, economists were wary of attempting to cover such an enormous field in a single volume, and abandoned it, in part, because they did not consider themselves competent to analyze such a vast subject (p.7).

In the theory of economic development, the issue par excellence is the growth of production per capita, and in no case distribution; in other words, it is not the desirability of production, nor its relation to the pursuit of goods with happiness. This paradigm occurred when growth was synonymous with development; but what is serious is the possibility that production may grow and that the mass of the people may become impoverished due to the poor distribution of income. What is important is not only consumption, but also production. Production may increase; and consumption may decrease, either because the propensity to save increases, or because the government uses a greater proportion of the product for its own purposes (Flores, 1967, p. 783).

The plan of the work was synthesized by Lewis in themes such as the effort to economize; the role of knowledge in development and the processes that favor both the accumulation and diffusion of knowledge; resources per capita and the population question; and the role played by government in economic development. Also, cumulative social change; methodology and factors generating growth (1955, pp. 19-21).

In terms of methodology, Lewis believes that production growth is dependent upon the

natural resources and human behavior; therefore, he considers that human actions should be investigated at three levels: effort to economize, increase of knowledge and its application, and increase of the volume of capital and other resources per inhabitant (p.11). On the most favorable conditions for the emergence of growth-promoting forces, the class of inputs, material and spiritual values, and growth as a cumulative factor are examined (pp. 12-13).

This field of analysis is bounded in the various branches of the social sciences, for economists study specialization and capital, mobility, invention and risk-taking without forgetting institutions. In the nineteenth century, they studied institutions; then the subject went out of fashion, and in the second quarter of the twentieth century it became the study of economists again; for Lewis, sociologists have abandoned the study of economic institutions to economists, and the latter have left the subject to sociologists.

Therefore, Lewis states that history can be rewritten according to new theories, and although the historian appeals to the data, he must do it in a different way than the chemist or the biologist; he must choose the most important causes, because each event has more history behind it (1955, p. 16).

1.5.4 Theory of economic planning

In the preface to his book *Theory of Economic Planning* (1966), William Lewis states that much has been written about the theory of economic development and very little about how a development plan is elaborated, what its most difficult parts are and what distinguishes a good plan from a bad one; therefore, he recommends that the ordinary citizen (whose life is affected by these plans) should have a short and simple text to help him understand them (p. 7). He further argues that the text *The Theory of Economic Development* is philosophical, while *The Theory of Economic Planning* is practical and instrumental; it consists of four parts: planning patterns, plan strategy, arithmetic and planning procedure.

The development plan consists of a diagnosis of current economic conditions, public spending or investment, likely private sector development, macroeconomic projections of the economy, and a review of government policies. Lewis suggests that indicative planning should be done, seeking to make the economy respond primarily to domestic demand, as in the case of maturing economies; and he stresses the importance of effective government decisions versus inefficient, corrupt and wasteful government (1966, pp. 12-17).

Further on, Lewis states that the first task of the development plan is to order and set priorities, that is, to establish development policies; therefore, he suggests investigating the potential of markets; evaluating the provision of public goods such as water, energy, transportation and communications; highlighting education as a priority; suggesting the need to improve the legal system and create markets; providing technical assistance to entrepreneurs; improving the use of resources; and increasing public-private savings (1966, p. 18).

Chapter 11 of the text outlines the plan's strategy, considering that the resources should be placed in the most efficient way possible.

The paper concludes with the comment that rapid growth is possible, but requires institutional changes; in other words, it must be a global concern, a prerequisite for the establishment of the maximum immediate income or its later attainment (1966, pp. 21-149). In the end, the development apostolate is summarized with the comment that rapid growth is possible, but requires institutional changes; in other words, it must be a global concern, a prerequisite for development.

1.6. Contributions by Simon Kuznets

Born in Russia of Jewish parents, he began his studies in his native country, but in 1922 he moved to the United States, completing his degree in economics at Columbia University. He is known for his system of national accounting and his analysis of business cycles, an area in which he published several books; he also devoted himself to the research of economic cycles, and identified the construction cycle with a duration of between 15 and 25 years, which was baptized the Kuznets Cycle.

This professor related economic growth and income distribution, originating his famous Kuznets Curve, a curve that is graphically represented as an inverted U; according to this curve, growth is sufficient to reduce inequality in the long term. The variables of the curve are inequality or the Gini coefficient on the Y-axis, and economic development or time or per capita income on the X-axis. This economist assumes that as a country develops, income becomes more concentrated and income distribution worsens, and then, in the long run, inequality levels off; however, he was always critical of the attempt to measure welfare exclusively on the basis of per capita income.

1.6.1. Measuring economic development

According to Kuznets, the economic development of a country is the sustained growth in its size as an economic unit. Conversely, stagnation and decline can be defined as the sustained inability of the nation's economic magnitude to grow, or its persistent decline (1947, pp. 72-73).

Development is a process, indirectly resulting from chemical, osmotic and other forces, by which matter is introduced into the organism and transferred from one part of it to another. By analogy, economic development is a process by which economic matter is introduced into the economy of one nation and transferred from one part of it to another.

As Kuznets (1976) puts it, there are inherent difficulties in measuring economic growth, apart from the availability of empirical data, which lie in modern economic growth, since it involves major structural changes and consequently important modifications of the social and institutional conditions under which the marked increase in per capita output is achieved (pp. 316-348).

1.6.2. Economic growth and economic structure

According to Kuznest, economic growth produces transformations in the socio-economic structure as structural change. In his book *Economic Growth and Economic Structure*

(1974), studies comparatively the economic growth of nations and, in particular, growth in the period covering the last two centuries, since 1870, considering it as a specific epoch. By economic epoch, the book means a relatively long period spanning more than a century, possessing precise characteristics that give it unity and differentiate it from the epochs that precede or follow it.

Kuznets deduces that there is economic growth when the population and its per capita product increase steadily, creating structural transformations (1995, p. 27). For example: modifications in the relative weight of the different productive sectors within the country's production, with parallel changes in the professional composition of workers, in the typology of economic organization and even in the components of consumption and investment. His objective is to lay the foundations for a theory of modern economic growth, and to this end he includes inequality by quantity with the Kuznets Curve (1973, p. 45).

To illustrate the above, it is worth analyzing the components of consumption. In low-income countries, the proportion of income allocated to private consumption is high (80% of GDP) because most of it goes to the acquisition of basic goods for life; while in higher-income countries, public consumption is 20% of GDP as a result of the development of the welfare state and the increased provision of public services (Kuznets, 1973, p. 429). This is a particular case on an international scale of the so-called Engel's Law, confirmed by comparative studies of the structure of consumption at different income levels, as explained by Kuznets (1974, p.180).

A conclusion of this economist's studies is presented by Gutiérrez-Barbarrusa and Malfeito (2017, p. 15), asserting that -probably as a consequence of globalization, which entails the greater worldwide integration of markets and the phenomenon of offshoring and the progressive industrialization of developing countries- there is a new process of structural change that begins to question the specific interrelationships of these components as stylized facts, at least since the late 1990s. However, Kuznets considers that a quarter of a century is too short a period of time to be able to affirm that we are witnessing structural change in a new economic stage.

Conclusions

The theory of modernization is the process by which the gap between tradition and modernity is eliminated by imitating countries that are supposed to have experienced a historical rupture, such as the Industrial Revolution. It is proposed in stages to imitate developed countries such as the United States and those of Western Europe.

Among the intellectual contributors evaluated are Walt Rostow (stages of growth), the structural-functionalism of Talcott Parsons (social action), William Arthur Lewis (dualism) and Simon Kuznetz (structure of capitalism). Due to space limitations, some of the

other pioneers were not contemplated, but in the following paragraph they are enunciated for the purpose of continuing the formative research.

Within the theory of economic growth there are two schools that represent disparate or diverse starting points; these are the theories of balanced economic growth and unbalanced growth. As theorists of the first strategy are Cassel (1927), Rosens- tein-Rodan (1943), Nurske (1953), Lewis (1965); and as spokesmen of the second are Pe- rroux (1955), Hirschman (1958), Myrdal (1957) and Streeten (1959). Scitovsky (1954) is placed in both strategies according to one or the other thinker.

Recommendations

For academics, it is important to build meaningful knowledge, that is, knowledge that serves to solve society's problems. This article can be involved in strategic and quality learning curricula, since we should not continue with a growth model with paradigms of the mid-20th century that destroys the environment.

Jaramillo (2017) in the Introduction expresses that there is an evolution in the business world and, therefore, a business direction is required to conquer new markets. He emphasizes that this is not only an economic-business challenge, but a commitment to development. Further on, this author states that price is not the only determinant of advantage and, therefore, a debate on competitiveness is required (pp. 89, 90). Jaramillo also cites Montoya and Castellanos (2008) to confirm the need to set aside comparative advantages and seek competitive advantages, which must be immersed in environmental care. For further information on this subject, see Erik Reinert in *The Globalization of Poverty* (2007) and Ha-Joon Chang with *Withdrawing the Ladder* (2009).

Another recommendation is influenced by Barraza (2018), who defines curriculum as the educational offer or proposal that involves institutional actions of the academy with the intention of training learners under considerations of quality, social justice, flexibility, democratization, community participation (p. 115). This suggests including the issues of climate change and the destruction of the environment for reasons of industrialization, a model obsessed with sustained economic growth without relating the negative externalities such as pollution.

Taking into account this article by Barraza, it is necessary to think that in industrial processes there must be a process of mimesis to nature, where all waste is in-put to another process. In other words, there is no waste; perhaps the exception in nature is migration.

A third recommendation is based on Polo and Villasmil (2018) who posit that Co-

Colombia has established guidelines for the structure and legal framework of VAT, including sales of movable tangible property, sale or transfer of intangible assets, provision of services in the country or abroad, exports, games of luck or chance, which are taxed at a rate between 5% and 19% (p. 21). From the above, the idea of taxing those polluting activities that still survive that paradigm of industrialization that confuses economic growth with development.

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