

MARIA AKULICH
JERZY KAŻMIERCZYK

**The socio-economic
approach to the study of
main economic systems.
Socialism and capitalism.
Part I.**

1. Introduction

In spite of the abundance of economic and sociological theories, there are only a few major types of economic systems, which then yield various mixtures of socialism and capitalism. The former involves a deep interference of the state in the market mechanisms and the state ownership of the means of production. The pure model of capitalism, as proposed by Marx's theory in its fullest sense, includes minimizing the importance of the state in favor of fully private ownership and following the market by dollar voting, which means that the market develops in the direction that is set by the daily choices that customers make in shops, restaurants, etc. when purchasing specific goods and services. As regards socialism, it is difficult to give an example of its full implementation. Communism in the full sense of Marx's theory has never existed in the world. Similarly, no country in the world fully respects the capitalist laissez-faire principles of the state's minimized interference in the market mechanisms. Of course, one may propose the examples of North Korea or the countries of the former

Prof. Maria Akulich
Tyumen State University
Jerzy Kaźmierczyk, Ph.D.
Poznan University of Economics
and Business,
Tyumen State University

USSR on the one hand and the US economy on the other, but these are only expressive examples of communism or capitalism rather than illustrations of the two idealized systems in practice. In theory and business practice, one can find numerous examples of socialist or capitalist thought, such as Marxism on the one side or the concept of the Washington Consensus on the other, which was also unknown in Poland (Każmierczyk 2015; Szarzec 2013). A closer examination of the 20th century brings one to the conclusion that socialism and capitalism were the most significant forms of socio-economic systems of this period.

The main aim of this paper is to present the concepts of socialism and capitalism and their mutual relations, a study to be further developed in the second part of this paper dealing with post-capitalism.

We used literature devoted to economics, sociology and philosophy in Polish, English, and Russian (EBSCO, Emerald, The ACM Digital Library, BazEkon, ProQuest). This article consists of introduction, methods subsection, the description of the capitalism and socialism, and conclusions.

2. Methods

Formational, civilizational, institutional, structurally functional, economic, socio-economic, sociocultural, ethnosocial, ethnological, psychologic, systemic civilizational, conflict and other approaches are used in the economic and social sciences (Smith 2012; Smith 1989; Ricardo 2001; Spengler 1991; Гумилёв 2004; Durkheim 1997; Le Bon 2001; Parsons 2013; Dahrendorf 1997; Huntington 2012; Harrison, Huntington 2000). Each approach can be successfully applied when analyzing a society as a whole or when analyzing its separate components. For the purpose of our research, the formational approach is the most appropriate method to analyze post-capitalist society and economy.

What is the essence of the economic approach? The formational approach is a vivid example of the application of the economic approach to the study of society. In modern societies, economy plays a priority role and determines the development of all other elements of the social system, including politics. Since economy is the main determinant of social development, it is necessary to study modern society from the point of view of a formational approach, which means the primacy of economy in relation to all other social processes and phenomena. The economic approach makes it possible to study society in all the diversity of economic development, but, unlike the formational approach, it will not be able to provide holistic characterization of society taking into account the knowledge of economy.

Methodological approaches to the study of society often consider society as a whole, as a system, without emphasizing a fundamental element, or purposefully study individual elements, subsystems of society. Using a formational approach we unambiguously define the main deterministic subsystem of society. It determines the emergence and development of all phenomena, processes and changes. In this connection, it can be said that it is the formational approach that allows us to adequately and scientifically substantiate the strategic direction of human development.

The formational approach used in K. Marx's doctrine assumes consecutive transitions through five socioeconomic structures according to the concept of material benefits production. The formational approach according to Marxism predicts that each society experiences the following formational periods: primitive society, slaveholding, feudalism, capitalism, socialism and communism. The period is generally identified by the type of ownership of the means of production. The use of the formational approach for modern conditions should not be perceived as a dogma. This topic is urgent and important for the history of certain countries and regions. The formational approach may help us better understand the economic development of modern societies, the modern economy, and global economic processes. It was successfully applied by Peter Ferdinand Drucker, Paul Mason, Christopher A. McNally, George Ritzer, Roland Robertson, Joseph Stiglitz, and Alvin Toffler (Drucker 2013; Drucker 2011; Mason 2015; Mason 2009; McNally 2012; Ritzer 2012; Robertson 1992; Stiglitz 2006; Stiglitz 2012; Toffler 1980; Toffler 1971).

3. Capitalism

Capitalism is a socioeconomic structure that is characterized by the use of private property for production, exploitation of the proletariat, class fights and the bourgeoisie obtaining most of the profit (Marx 1970). Whether a society is capitalist there is an economic determination regarding the perspective on the society and includes private property used for production and constant and higher profits that belong to a capital holder. A capitalist society is also indicated by domination of the commodity-money relationships and market development, growth in the nationalization of production and labor, exploitation and alienation of the individual from the results of his/her activity, domination of the bourgeoisie and the state expressing the interests of the bourgeoisie.

In K. Marx's «The preface to criticism of political economy», Marx accurately stated that «the method of production of material life causes social, political and

spiritual processes of life in general» (Marx 1970). Marx understood production forces and production relationships and referred to them as the economic basis of society on which the superstructure flourishes.

Capitalism, during its development, passes through certain stages, which include origination, development and decay. K. Marx perceived that moving from capitalism to communism would solve the decay problem. However, this is possible only when the necessary objective conditions are mature. Revolution may occur and change the existing systems, including capitalist systems, as occurred during the 20th century. However, it is impossible to develop a communist society in a society that has a low level of economic development, an existing culture and value system priorities. The experience of the 20th century demonstrated that it is not possible to construct communism in a separate country or in a set of countries that did not pass the blossoming stage, a post-capitalism stage that can last for more than a century.

Modern capitalism does not remain invariable; rather, changes that strengthen social orientation and humanization occur. Numerous achievements and progress by socialist countries, including free education and medical services, were implemented by capitalist countries. However, capitalism is a social system and unfair social construct because of the income distribution and social benefits. Capitalism is a social system that results in billionaires and beggars and both disadvantaged and incredibly wealthy individuals. The capital market, including economic internal and international relationships, may cause crisis situations, but it also promotes solutions (Fiedor 2010; Fic, Wyrwa 2004; Jaźwiński 2011; Barska, Jędrzejczak-Gas 2016; Wallerstein 1999; Kaźmierczyk 2011; Czyżewski, Majchrzak 2017).

Capitalism does have advantages, including a high level of personal initiative, freedom of enterprise, and a priority for civil liberties that allow individuals to develop in the modern world. Because capitalism is a cost-efficient socio-economic construct, despite its problems and shortcomings, it continues to occur as a social structure of modern societies.

We could observe capitalism in many countries, like Poland and Russia. The beginnings of capitalism in Poland can already be seen in the Middle Ages, but just as in the West, capitalism in Poland began to develop intensively only in the 19th century. At the same time, it must be remembered that for 123 years (until 1918) Poland was occupied, which significantly influenced development opportunities. Nonetheless, such names as Cegielski from Poznan, Grohman, Poznanscy and Scheibler from Lodz – the owners of spinning plants and cotton weaving mills – are known to date (Grot 2000; Skrzydło 2000, pp. 35-43, 53-55).

Later, the world (including Poland) suffered the consequences of the Great Depression of 1929-1933. It was strongly influencing the textile, metal and confectionery industries, as well as agriculture: prices fell, and the debt was rising (Roszkowski 2009, pp. 64-65). Some businessmen lost their estate, being divided among creditors (Jeziarski 2003).

The emergence and development of capitalism in Russia looked different than in Europe. Nicolas Werth considers the character of industrial development in Russia, and notes that since the time of Peter the Great, capitalism had been "completely under the control of the state and developed very unevenly" (Werth 1992, p. 9). State control and uneven economic development has had a long history. Nicholas Werth also notes the development of railway construction since 1861, which had become "the driving force of industrialization," (p. 10) although "the country's economic backwardness was a serious obstacle to industrialization" (p. 10). Vladimir Ilyich Lenin studies the development of capitalism in Russia and cites figures: "the Russian railway network had increased from 3,819 kilometers in 1865 to 29,063 kilometers in 1890, that is more than 7 times. The corresponding step was made by England in a longer period (1845 - 4,082 km, 1875 - 26,819 km, an increase by 6 times), by Germany in a shorter period (1845 - 2,143 km, 1875 - 27,918 km, an increase by 12 times)" (p. 410). He also notes that from 1863 to 1897 the entire population had increased by 53.3%, rural population by 48.5%, and urban population by 97.0%" (p. 415). It means that cities (especially large ones) had been growing twice as fast as the rest of the country. 27% of the total number of citizens in 1863 lived in large cities, and in 1885 it was already 41%, and in 1897 about 53% (p. 415). Albert L. Weinstein analyzed the national income and stated that 21.3% of it was created by industry, and 8% by transportation and communication (Weinstein 1969, p. 71).

Such names of Russian industrialists as Savva Timofeevich Morozov, the Demidov gens, Stroganovs gens, were popular not only in Russia but also beyond (Potkina 2004, p. 231; Chumakov 2011, p. 272; Gavlin 2002, pp. 7-10). Such data are indicative of the development of capitalism in Russia in the pre-revolutionary period. Often it was based on natural resources. Russia has always been rich in natural resources, and these still influence its economy (Kovalevsky 2010, p. 399). This is both a blessing and a curse for Russia, being less motivated to develop in other directions.

4. Socialism

Socialism is the first stage of a communistic socioeconomic structure and theoretically is characterized by public property used for production, lack of

exploitation, dictatorship of the proletariat and a state (non-market)-planned economy. The following criteria are used to indicate a socialist society: social determinism; public property used for production and profits that belong to all members of the society; domination of a state-planned economy and lack of a market; collectivization and a public nature of labor; a lack of exploitation and alienation of citizens from the results of their labor; domination of the proletariat; a lack of antagonistic classes and class struggles; and the state expresses interests in all members of the society.

It is possible to characterize the essence of socialism briefly in this manner; however, in reality, socialism does not always correspond to these theoretical postulates. The transition to socialism has often occurred through revolution (Russia) and has often been followed by civil war (People's Republic of Kampuchea). A dictatorship of one class of the proletariat is established (Cuba and North Korea). In many cases, religion was removed from public life and forbidden (Albania and China). Nationalization and collectivization did not produce the expected long-term results (Poland and Hungary). These issues are destructive to the proper functioning and development of a socialist society.

The socialist system disintegrated without having a sustained competitive economic struggle as a capitalist system and especially also because of limited cooperation with other socialist and capitalist countries. A powerful communist state, the Union of Soviet Socialist Republics, disappeared from the historical arena on December, 1991. The majority of socialist countries refused to implement communism and maintained socialism. These countries used private property for production and returned to a capitalist system of management.

It is important to systematize the benefits and disadvantages of socialism, including mistakes and achievements, to understand historical events. Such systematization is urgent because of changes in political regimes in different regions of the world; many individuals must make choices regarding the ideas that they are going to implement in state and social policy. In many cases, political parties and social movements declare that a course towards socialism or communism would have considerable benefits.

Economically developed socialist countries have managed to make improvements in the lives of their citizens. A state-planned economy dictates the priorities for the development of industries that are strategically important for the state. Concurrently, the state could plan other national industries to be developed on the principle that certain indicators increase without considering the changing circumstances. The system of state planning demonstrated its inability to meet the requirements of social reality. Socialist states developed

branches of economy which were particularly important for the governing party, like heavy industry and military industry.

Countries with socialist systems provide for equality in achieving social status. Citizens have access to free education and medical services, but often with no incentives to develop. A general secondary education is provided for all citizens, and training systems are created, including schools, technical schools and higher-education institutions. These countries ensure the equitable distribution of state funds for housing according to the principle "to everyone on merits". The largest and the most significant example of a socialist system (the USSR) made significant progress in space exploration; experienced economic development in remote regions of the country, including settling its far northern regions; and formed and developed a nuclear industry. A belief in the victory of communism was an important propaganda motivator for progress and achievements by the Soviet people. During the Soviet Union period such projects as the Baikal-Amur Mainline were built. Money was not the most important factor for development at that time. This ideology was directed to forming a sense of patriotism that was most apparent during the war (the recovery of cities and factories that were destroyed during the war) and occurred during periods when new regions were settled. It is important to note that personal motivation played a certain role in the belief in communism (trust of the leader and sometimes fear of repression).

Public property may influence society's development and may also benefit individuals. However, the public form of ownership may be a restraining factor for development. This is confirmed when socialist countries return to a capitalist type of ownership.

Public property was perceived by the mass consciousness as a general ideal for the entire population. The economy developed according to a plan and a collective labor distribution of the benefits was performed according to the principle «from everyone according to his abilities, to everyone as he works». For collective labor, individuals' work evaluations are not accurately determined; therefore, the income distribution naturally becomes equalized. Gini coefficient for money incomes in Russia was rising from 0.26 in 1991 to above 0.46 in the first years of freedom, after which it stabilized at about 0.40 (Shleifer, Treisman 2005, p. 159; Voronov 2016, pp. 276-277; Davydenko, Arbitailo 2016; United Nations Development Programs 2018; The World Bank 2018).

Poles were also involved in the socialist movement, and the Poznan strikes in the 1870s were a manifestation of it. In the 1890s, during the partitions of Poland, Polish socialist organizations were formed (Davies 1999, p. 992-993), and between the First and the Second World War, socialist trade unions, youth unions and

cooperatives were developed. The creation of the Polish United Workers' Party in 1948 had much more serious consequences.

The equalization principle of benefits distribution and paternalism do not motivate an individual to engage in effective labor and successful activities. Collective, social labor in a case of equal distribution loses its motivational effect and leads to alienation from the results of labor.

The development of a civil society and its institutions are created purposefully but do not appear gradually during the course of evolution. Progressive ideas are limited by a dominant sense of negativity related to the formulation of new ideas, limiting the development of diverse opinions. The sciences are an exception to this rule, particularly sciences connected to basic industries of the economy. Numerous scientific achievements, including rationalizing ideas related to the development of production, were not put into practice because the bureaucratic apparatus was not sufficiently flexible.

Socialism undoubtedly impacted post-capitalism and strengthened its social orientation. A post-capitalist society accepts certain socialist concepts and successfully implements them. A good example of this is Swedish socialism, which may be considered post-capitalism because of key economic criteria. John Kenneth Galbraith considered the idea of the convergence of the two social systems: capitalism and socialism (Galbraith 1967).

The humanistic concepts of communism and socialism are so attractive that many countries instituted socialism within decades; thus far, the communist system remains ideal for human communities. Historical experience demonstrates that implementation of communist concepts at the present stage of humankind's development is improbable. Looking from the socialists theory point of view it is because of a lack of objective and subjective prerequisites, humankind is not prepared to reform modern societies into communist societies and probably will never be.

5. Summary

In the 17th and 18th century, revolutionary changes took place in Great Britain, France, and the USA. Those changes contributed to the rapid development of capitalism. Later, there was a gradual evolutionary change in the forms of capitalism. There were no reforms leading to the abandonment of the capitalist mode of production in these countries.

In the USSR and the socialist countries an unprecedented transition at first from capitalism to socialism, and then back from socialism to capitalism took

place. This absolutely did not fit into the Marxist scheme, although the very method of formational changes, as Karl Marks has pointed out, always had a revolutionary character that presupposes a radical breakdown of one social order and its replacement by a fundamentally different one.

Society viewed from the socio-economic position, appears to be an economic system with social characteristics. The application of the formational approach makes it possible to carry out an analysis of the global socio-economic systems of 20th century: capitalism and socialism. The modern society is developing towards new form of capitalism. Although in the 20th century global capitalist and socialist systems existed apart, they also influenced each other.

The authors do not pretend to complete and comprehensively study the social systems. At the same time, the article attempts to consider the development of society from the standpoint of a formational approach. This makes it possible to reveal the tendency for the development of modern societies towards new form of capitalism. A certain argument is given, although the problem remains controversial and requires further focused research. It is also important to try to look at trends in the development of modern society from the perspective analyzed in this article; especially by that researchers involved in the study of socio-economic development of society.

Summary

The socio-economic approach to the study of main economic systems. Socialism and capitalism. Part 1.

Society is explored with the help of various approaches and methods that allow us to analyze the economy, politics, culture and society. Society as a socio-economic system can be effectively studied from the standpoint of the socio-economic approach, which is implemented within the framework of the formational approach. It was formerly used e.g. by Daniel Bell, John Kenneth Galbraith, Karl Marx, Leonid Weger, Yoshihiro Francis Fukuyama, Erik Olin Wright, and Immanuel Maurice Wallerstein. Formational approach allows us to analyze the global social and economic systems of the 20th century: capitalism and socialism. From the standpoint of this approach, the main difference between capitalism and socialism is the presence or absence of private ownership of the means of production. This feature has an impact on all aspects of social life in these systems. During the existence of these global systems, we have accumulated a rich experience of development in all areas of

social life, which is analyzed in this article. The proposed article considers the positive and negative aspects of the development of capitalism and socialism. The directions of development of social and economic systems towards new form of capitalism are described and analyzed.

Keywords: *socialism, capitalism, post-capitalism, globalization.*

Streszczenie

Społeczno-ekonomiczne podejście do badań głównych systemów gospodarczych. Socjalizm i kapitalizm. Część 1.

Współczesne społeczeństwo jest badane za pomocą różnych podejść i metod, które pozwalają analizować gospodarkę, politykę, kulturę i społeczeństwo. Społeczeństwo jako system społeczno-gospodarczy może być skutecznie badane z punktu widzenia podejścia społeczno-ekonomicznego, które jest realizowane w ramach podejścia formacyjnego. Było ono wcześniej wykorzystywane np. przez Daniela Bella, Johna Kennetha Galbraitha, Karła Marxa, Leonida Wegera, Yoshihiro Francis Fukuyamę, Erika Olinę Wrighta, oraz Immanuela Maurice Wallersteina. Podejście formacyjne pozwala analizować globalne systemy społeczne i gospodarcze XX wieku: kapitalizm i socjalizm. Z punktu widzenia tego podejścia, główną różnicą między kapitalizmem a socjalizmem jest obecność lub brak prywatnej własności środków produkcji. Ta funkcja ma wpływ na wszystkie aspekty życia społecznego w tych systemach. Podczas istnienia tych globalnych systemów ludzkość zgromadziła bogate doświadczenie rozwoju we wszystkich dziedzinach życia społecznego, które jest analizowane w tym artykule. Proponowany tekst uwzględnia pozytywne i negatywne aspekty rozwoju kapitalizmu i socjalizmu. W tekście opisano i przeanalizowano kierunki rozwoju systemów społecznych i gospodarczych w kierunku postkapitalizmu.

Słowa

kluczowe: *socjalizm, kapitalizm, postkapitalizm, globalizacja.*

JEL

Classification: A1, B00, E00, A1, H00, P00

We are very grateful to Katarzyna Szarzec for an in-depth proof-reading and many constructive opinions. All errors and shortcomings are charged to the authors.

This article constitutes a coherent whole with the text: M. Akulich, J. Kaźmierczyk, Socio-economic approach to the study of main economic systems. Post-capitalism. Part 2. It provides an introduction to further research on post-capitalism.

The study was sponsored by RGNF (Russian Humanitarian Science Foundation). Project: "Capabilities and restrictions of new industrialization and contradictions of sociocultural space: on Tyumen region example", No. 16-03-00500. Tyumen State University.

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