Comparison of Modernization Theory and Dependency Theory

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Modernization Theory (MT) and Dependency Theory (DT) were developed by sociologists to explore and understand the concept of global inequality. Coccia (2019) explains that MT and DT differ primarily because the former's primary focus is on underdeveloped nations while, in contrast, the latter's focus is on developed and wealthy nations. This essay will describe the two theories in the author's words, highlight their differences, and identify the one that most usefully explains global inequality. It will further point out whether the theories can be applied to stratification within the United States and, if so, determine the United States' place in the global stratification structure.

While MT appears to be more of a progressive narrative, DT emphasizes competition. They differ because MT opines that developing countries can succeed by emulating developed countries, but DT rejects this opinion. This assertion is supported by Antunes de Oliveira (2019), who explained that the context in which the first-world countries developed a few centuries or decades ago is not similar to the one in which the third-world countries are trying to build today. On the one hand, MT is designed to understand how underdeveloped economies transform into modern economies. On the other hand, DT attempts to understand economic development through external influences such as cultural, political, and economic impacts on a country's development policies. This, especially from the perspective of external influences, is inferred to mean that some countries develop and become wealthy at the expense of others (through ways such as colonization).

DT is more useful in explaining global inequality. According to Scheiring (2021), in contrast to DT, MT is not only a Eurocentric but also a patronizing approach towards matters of inequality. While DT hypothesizes that global inequality results from high-income countries exploiting low- and middle-income countries, MT is premised on the belief that low-income countries can raise their global economic status through infrastructure development and industrialization, as well as a cultural shift in their attitudes towards work (Nee, 2019). However, Munck (2021) agrees with Nee (2019) that as long as low- and middle-income countries depend on high-income countries for economic stimulus, they will neither achieve sustainable access to the global economy nor stable economic growth in a self-determined manner. This is also supported by the observation that as long as high-income countries and institutions such as the World Bank create the eligibility criteria for loans and choose the projects to support, they will only segment the labor markets for their benefits rather than assist the aid recipients (Antunes de Oliveira, 2020). For example, a high-income country can outsource considerable amounts of work and raw materials from a low- or middle-income country, which, in essence, appears to be healthy for both countries. However, Christofis (2019) points out that high-income countries are always cautious to ensure that the relationship only provides certain benefits but does not boost low- or middle-income countries to become economic threats. Therefore, unlike MT, DT reveals that low- and middle-income (or periphery and semi-periphery) countries are not equal and independent in their partnerships with high-income (or core) countries.

Social stratification describes the way people in a society are categorized based on class-related factors such as power, economic status, family background, education, and social worth (Coccia, 2019). The significance of social stratification stems from its implications, whereby while it can maintain social order, it also has negative consequences, such as unequal access to opportunities, resources, and power (Christofis, 2019). Social stratification specifically applies to the scenario within a country; however, viewed from a broader perspective, the same concept can be applied to the inequalities between countries and referred to as global stratification. Stratification at the global level is the divide between the Global North (including the United States, Great Britain, Eastern Europe, Japan, and China) and the Global South (encompassing most African and South American countries). According to MT and DT, the United States is within the uppermost strata of the global stratification structure. MT posits that a country is placed high in the ranking by factors such as structural superiority, particularly technological and infrastructural, and cultural differences from those in lower strata (Antunes de Oliveira, 2019). Conversely, DT proponents agree that while the United States ranks high, it achieved the position by exploiting its partners in the peripheral and semi-peripheral countries (Antunes de Oliveira, 2020).

From the MT perspective, the United States can be said to rank high because it developed appropriate values, beliefs, and practices (the correct culture) that support industrialization, trade, and fast economic growth (Scheiring, 2021). The cultural traits, for example, include not only abandoning “backward” traditions but also the disposition and attitude to work hard. According to Nee (2019), cultural traits helped individuals and corporations in the United States adopt a future inclination instead of maintaining existing conditions. In contrast, DT is of the view that the United States is wealthier relative to countries in the lower strata because it uses global stratification to deny them the opportunity to pursue economic growth (Munck, 2021). Additionally, Munck (2021) and Scheiring (2021) argue that multinational corporations in the United States continue exploiting resources and labor from the least developed countries.

Both MT and DT can be applied to stratification within the United States, especially considering the social status gap between the majority and minority/marginalized groups (Doob, 2019). Majority groups, for example, such as Caucasian men in the high-income class, exploit minority/marginalized groups such as illegal immigrants for cheap labor (Sorokin, 2019). While the minority may not be resourced with the education and specialized skills of the upper class, they are nonetheless exploited for labor and stereotyped to have the wrong cultural beliefs, values, and practices, which is consistent with DT (Sorokin, 2019). Conversely, the upper class believes they have the right to dominate over the lower classes because they (the upper classes) adopted a future inclination that propelled them upwards on the social hierarchy (Doob, 2019). Viewed in another way, the same concepts of MT and DT can be graded down from the macro (global) level and applied to the micro (social) level.

This paper has described MT and DT and determined that DT is more useful in explaining global inequalities. DT reveals how core countries exploited periphery countries to enrich themselves while denying them the opportunity to pursue prosperity, but MT blames underdeveloped countries for refusing to change. Similarly, both MT and DT place the United States high in global stratification but attribute the ranking to different reasons. While MT opines periphery countries did not adopt the correct values and practices, DT believes the core countries misused the periphery countries and took their resources. Finally, it has been shown that the same concepts of MT and DT at the global level can be applied to stratification and the social level within the United States.

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