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**Conceptual issues and peripheral scholarship:  
hegemony, disciplinary sociology and IR in Belarus  
and Ukraine**

DOCTORAL DISSERTATION

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### **Author's Declaration of Originality**

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## Dissertation Abstract

This work questions the conventional conceptualization(s) of hegemony within the subfield of the sociology of IR. Despite the concept's central position within the subfield, it is not immune to a series of misinterpretations and non-critical borrowings. Those had led the subfield into a conceptual dead-end, which, in turn, heavily affected the former's empirical research orientations. In particular, disciplinary sociology was deprived of an ability to effectively locate the patterns of disciplinary dominance, instead being preoccupied with registering mere patterns of diversity and plurality.

Thus, this work aims to investigate conceptual issues associated with hegemony. In particular, it concerns tracing the concept's evolution of usage and semantic oscillations within and outside of IR. This, in turn, might allow a more nuanced and eclectic understanding of disciplinary hegemony. For this purpose, the work starts with the historical review of hegemony and its socio-political context of usage to prepare the ground for an overall assessment of the Gramscian conceptualization of hegemony and those which are conventionally labeled as the post-Gramscian. Subsequently, it moves on to investigate the existing theoretical traditions within IR to trace the channels of possible misinterpretation of the notion of hegemony by disciplinary sociology. Finally, it comes to the problem of disciplinary hegemony to critically assess the current conceptualizations of the latter with the backdrop of the abovementioned hegemonic traditions.

As a result of this conceptual analysis, three outcomes are presented. The first locates the current misinterpretation of the disciplinary hegemony in misreading Kal Holsti's thesis regarding the nexus of national-academic and national-intellectual hegemonies. The second formulates the double self-referentiality thesis. The latter concerns the sociology of IR's treatment of its object of research, namely the discipline of IR, in the same manner as its parental discipline treats its object of study, namely the international. The third formulates several hegemonic analogies, i.e., alternative conceptualizations of disciplinary hegemony based on the results of the abovementioned analysis of various hegemonic traditions. In particular, it goes about the Gramscian, structural-realist, post-structuralist, and world system analogies and emulation of the English school and neo-liberal analogies.

On par with its conceptual focus, this work has an evident empirical aspect. With the help of bibliometric analysis, it approaches two peripheral IR communities, Belarus and Ukraine. Its methodological framework consists of three crucial elements. A citation patterns analysis serves the purpose of tracing patterns of intellectual and disciplinary dependencies. A thematic content analysis, with its emphasis on research topics, paradigmatic and methodological position advanced, gives a more substantial picture of the local disciplines. Finally, the author profile analysis complements the latter two methods with author-level attributes and advances a scholar-level image of the participatory patterns of the local disciplines.

Apart from the subfield's convention of generating data about the peripheral national IR communities, the empirical part has a clear connection to the conceptual one. This connection unfolds as follows. First, the case selection is significantly based on the research logic brought in by the conceptual part. Second, its focus on specific aspects of the peripheral publishing patterns (reference time lag adjusted for the linguistic dimension, regional hegemon thesis, etc.) directly results from the empirical operationalization of the respective hegemonic analogies. Third, its attempt to bring methodological novelty, namely that of the thematic and citation analysis merge, comes from the issue-areas hegemonic analogy.

## List of Abbreviations

<b>APIR</b>	Actual Problems of International Relations (journal)
<b>BJILIR</b>	Belarusian Journal of International Law and International Relations
<b>BSU</b>	Belarus State University
<b>CEE</b>	Central and Eastern Europe
<b>CPM</b>	Core – Periphery Model
<b>EE</b>	Eastern Europe
<b>EISA</b>	European International Studies Association
<b>ES</b>	The English School of international relations theory
<b>FP(A)</b>	Foreign-Policy Analysis
<b>FSU</b>	Former Soviet Union
<b>GIRD</b>	Global IR Debate
<b>HST</b>	Hegemonic Stability Theory
<b>IR</b>	<i>International Relations</i> as an academic discipline
<b>ISA</b>	International Studies Association
<b>KIIR</b>	Kyiv Institute of International Relations
<b>NG</b>	Neo-Gramscianism
<b>NGO(s)</b>	Non-governmental Organization(s)
<b>SIR</b>	Sociology of IR
<b>STS</b>	Science Technology Studies
<b>TCC</b>	Transnational Capitalist Class
<b>TDC</b>	Transnational Disciplinary Class
<b>TRIP</b>	Teaching, Research, and International Policy project
<b>UCU</b>	Ukrainian Catholic University
<b>WBW</b>	<i>Worlding Beyond the West</i> book series
<b>WST</b>	World System Analysis

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## **In place of a general introduction**

This work has two primary goals as its research rationale. The first is conceptual and concerned with problematizing the conventional narrative about hegemony within disciplinary sociology. Since much of this narrative is based on references to the subfield's parental discipline and non-IR perspectives, such as the Gramscian one, an extensive conceptual case study is undertaken. The work analyzes and traces conceptual oscillations of hegemony in various intellectual contexts ranging from Russian revolutionary thought to one of post-structuralist analysis. As a result, several critical observations and conclusions are put forward. The latter is a starting point for reapproaching disciplinary sociology's conceptualization of hegemony. An essential rereading of hegemony's usage in the sociology of IR is presented. The primary preparatory element of this rereading is the location of the roots of conceptual misreadings and misinterpretations. Those are taken associated with the issue of double self-referentiality and Holsti's curse.

Subsequently, as a result of this rereading and based on the above-mentioned conceptual analysis of hegemony's usage in other intellectual domains, several hegemonic analogies are put forward. The most promising of those are linked to the neo-liberal perspective and its emphasis on the issue-area character of dominance, leading this work to the notion of disciplinary issue-areas and a corresponding domain-specific dominance, as well the realist inspired idea of the disciplinary public goods provided by a disciplinary hegemon. Moreover, the analogies derived from the ES, WST, and post-structuralist reading of hegemony ascribed a similar promising character. In particular, it goes about the emulation without recognition, disciplinary state-society theses, and the idea of discursive hegemony.

The conceptual part of the work is followed by an empirical investigation of the publishing patterns in two peripheral IR communities of Ukraine and Belarus. This investigation aims to provide an exploratory confirmation of the inadequacy of the aggregate-attributive operationalizations of disciplinary hegemony. This confirmation is planned to be achieved along both thematic and citation patterns dimensions. Similarly, the gender gap is to be examined concerning the peripheral case-specific variations concerning the gender composition of the profession. In addition, the regional hegemon thesis/disciplinary semi-periphery thesis is put forward for empirical confirmation from the data regarding the Russian disciplinary presence in the national IR communities of Belarus and Ukraine. Likewise, the regional character of IR in CEE is empirically questioned by looking at the patterns of geographic participation, references distribution, or thematic proximity. Finally, the issue-area analogy is preliminarily tested by applying the methodological merge of the thematic content analysis and the references analysis.

Yet, all of this is more of a general statement of research purpose with no particular linkage to the structure of this work and no specific association with any of the respective parts of this work. Thus, what follows is the structure-oriented introduction to this work and the structurally oriented narration of the investigatory process. However, before one dives deeper into the structure-oriented introduction to this work's thematic and research design, it appears necessary to contextualize further the abovementioned problems.

## Contextualizing the problem

As mentioned in the passages above, this work belongs to the domain of the sociology of IR. The latter is a realm of IR scholarship interested in how its parental discipline develops over time and what is its current disciplinary structure.<sup>1</sup> This interest expresses itself in analyzing the institutional dimension of IR and the latter's epistemic-intellectual framework.<sup>2</sup> More importantly, what distinguishes this subfield from a mere disciplinary self-perception is its attempt to conceive the two as conditioned by and located within the permanent process of the mutual constitution (co-constitution) and co-exposure to the broader societal context. Hegemony or better to say, disciplinary hegemony, occupies a central position in the conceptual and thematic universe of the subfield. It takes various forms ranging from disciplinary domination to disciplinary inequality.<sup>3</sup> It is taken to mean the monopolization and homogenization of the intellectual disciplinary landscape and the predominance of material resources possessed by a national scholarly community relative to other communities.<sup>4</sup> It gives the subfield its primary research theme and investigatory problematic while at the same time acting as the main buzzword of disciplinary sociology.<sup>5</sup> It is used so frequently that its problematic character might appear to represent some "conceptual paranoia" rather than a well-thought criticism. However, on the other hand, the very same concept makes disciplinary sociology doubt the existence of its reference object: not being able to conceptualize and properly operationalize it empirically (beyond the mere statics of the temporal distribution of "ideas" and "resources") the subfield prefers to proclaim the absence of disciplinary hegemony, and label the American disciplinary dominance thesis as a mere episode of its history at best, or simply a part of the disciplinary folklore in the worst case.<sup>6</sup>

What is even more interesting, this change of attitudes toward the character of IR is associated chiefly with the empirical strand of disciplinary sociology, where some scholars tend to avoid elaborations on the meaning and essence of disciplinary hegemony, limiting their input to a mere report on the empirical make-up of the discipline, others tend to argue with haste that dominance is associated with intellectual homogeneity and material inequality.<sup>7</sup> This, in turn, leads them to proclaim that the discipline of IR cannot be described as one dominated by any IR community and its disciplinary fashions since the former is characterized by high levels of the geographical diversity of its participants on par with similarly high levels of theoretical pluralism.<sup>8</sup> However, being done with the issue of hegemony associated with the US IR community, namely proving it to be a part of IR's mythology akin to the first Great Debate, hegemony doesn't disappear from the subfields scene. In particular, the normative strand of the sociology of IR takes on the banner of disciplinary hegemony in IR.<sup>9</sup> To be more precise, it is not that this strand of disciplinary sociology did not use hegemony before. It is more about the former becoming the only part of the disciplinary sociology which might legitimately and freely talk about disciplinary hegemony.

Specifically, it turns out that the only disciplinary dominance one can discuss is associated with the West's dominance within the discipline. This is so since, while disciplinary dominance is associated with a predominance of resources and, more importantly, intellectual monopoly, we cannot connect it to any other notion apart from the

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<sup>1</sup> Grenier et al., 2019

<sup>2</sup> Weaver 1998.

<sup>3</sup> Turton 2015.

<sup>4</sup> Alejandro 2017.

<sup>5</sup> Alejandro 2019.

<sup>6</sup> Ibid.

<sup>7</sup> Peters et al. 2016.

<sup>8</sup> Malinaik 2018.

<sup>9</sup> Bilgin & Tanrisever, 2009, Alejandro 2019.

one of civilization. The latter is quite challenging to define and maybe even more difficult than hegemony itself, thus allowing for high levels of conceptual fuzziness which serve two purposes simultaneously: providing necessary protection against constructive critique, namely, when no one knows precisely what you are talking about, you can put forward various assumptions with no real fear of being accused of doing not just “wrong science,” but rather “bad” one; moreover, it gives you an upper hand in terms of putting forward arguments, namely if civilization is “everything” then Western disciplinary dominance is as well everything one encounters in the discipline. Yet one should be careful to distinguish between the Western-centric bias of the profession (for example, its conceptual formulations)<sup>10</sup> and the Western disciplinary hegemony. The former originates in the historical sociology approach toward international politics and IR theory.<sup>11</sup> Although it shares the emancipatory impetus of the normative strand, its substantial focus does not overlap with the issues of disciplinary dominance in IR.

Moreover, the former is the only solid ground about disciplinary hegemony that the normative strand of the sociology of IR has. The material predominance claim, in turn, is only the enlargement in the scope of the national community hegemony claim, which is occasionally employed for instrumental reasons rather than those of substantial argument. The normative strand suffers not only from the lack of tangible examples concerning the non-Western IR scholarship (not in terms of geographical or institutional belonging, but actual theoretical and conceptual content)<sup>12</sup> but also from being unable to clarify what is meant by the non-Western IR scholarship.<sup>13</sup> However, this is not the primary issue thus far. What is important is the peculiar observation, or better to say, an assumption regarding the linkage between the diminished “popularity” of the national hegemony claim and the simultaneous rise of the civilization-centered claims from the side of the normative strand. In particular, it might be said that this shift is natural since every IR scholar and student working outside of the Anglo-Saxon disciplinary core “feels” that the discipline is not pluralistic and “free.” However, while she cannot voice her dissent through the national disciplinary hegemony claim, the only option remaining appears to be the Western hegemony claim. In this sense, the current “popularity” of the latter claim might be attributed more to the lack of meaningful alternatives rather than its heuristic quality and potential.

By now, the reader might wonder how all of the abovementioned issues pertain to hegemony, or to be more explicit, what is so wrong about hegemony and its usage by disciplinary sociology, and how it relates to the shift in the research agenda of the latter subfield. The point here is that the abovementioned shifts present a peculiar case concerning disciplinary dominance, namely how it is possible that without a significant change in the conceptualization and operationalization of disciplinary hegemony, we find no patterns of the latter on the national IR community level (read *inter-communal*), while clearly “see” it on a higher level of analysis, namely the one of civilization (if there is such a level at all). One might say that the answer pertains to the embedded Western way of thinking and doing the discipline, which is not empirically or theoretically visible on individual or national levels and which expresses itself if one “goes up and steps aside,” namely an emergent phenomenon having micro-foundations, based on the interaction of structural elements on the lower levels, and not directly identifiable.<sup>14</sup> Or from a different perspective, one can say that this is a natural trend that stems from the specifics of IR as a social system, namely the ever-present process of increasing internal complexity at the

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<sup>10</sup> Hobson 2012.

<sup>11</sup> Ibid.

<sup>12</sup> Eun 2019.

<sup>13</sup> Acharya & Buzan, 2017.

<sup>14</sup> Kurki 2007.

expense of the external's environment complexity.<sup>15</sup> These might be a set of plausible answers. However, this work can neither develop it further nor provide a coherent critique, thus leaving it to those advocating the Western disciplinary hegemony thesis and possessing suitable expertise and knowledge.

Yet, this work takes a different stance on this issue. The reason for such a situation might be more straightforward and banaler, namely a mere conceptual misreading by those employing the term hegemony. Otherwise, the best answer thus far is that hegemony assumes so many close but different meanings that, in the end, it stops having any meaning but one. And this meaning is the one everyone tries to dissociate herself integrally from, namely the one of a mere monopoly. Whether a monopoly is understood as a unipole or a monopoly closer to the logic of homogeneity is a secondary yet still prominent issue. The problem is that whenever hegemony is used within disciplinary sociology, and whatever theoretical "flavoring" is used, it is always about "monopoly." This leads to various problematic situations in seeing the discipline empirically. In particular, it pertains to the fact that everyone "feels" that specific groups and communities of scholars dominate the profession. At the same time, disciplinary sociology tells us that IR is theoretically pluralistic and expresses high levels of geographical diversity among its participants.<sup>16</sup> Moreover, as one can now see, if hegemony is conceived as a monopoly, then there is no contradiction between the national vs. civilizational hegemony claims; quite the contrary, the shift toward the latter appears to be a natural one. Specifically, while finding a US, British, French, or Canadian "connection" throughout all of the disciplines, both institutionally (material terms) and theoretically (ideational), is impossible, the shift to civilizational "lenses" allows reaching the necessary level of generalization where "hegemony as a monopoly" becomes visible.

Thus, as one can guess, the primary focus of this work is the concept of hegemony, its historical evolution, status, and location within IR, and by extension and the structure of narration, the one within the sociology of IR. To succeed in this quest, the work attempts to fixate on the meaning of hegemony through its conceptual rereading. What is meant by this is the attempt to question the conventional oppositional couple of material vs. ideational disciplinary hegemony, with the corresponding analogy of realist vs. Gramscian hegemony.<sup>17</sup> To achieve this end, there is a need for reapproaching the concept of hegemony from a perspective of a non-IR tradition, on par with clarifying the existing understanding of the former concept in IR itself. The latter task is necessary to avoid the dangerous simplistic readings of hegemony acting primarily as a prestige reference rather than a substantial reference to a theoretical tradition.

Going this long and seemingly useless road would allow the current work to achieve several ends concerning disciplinary hegemony. First, by rereading the hegemonic traditions in and outside the realm of IR, it becomes possible to assess the existing conceptualizations of disciplinary hegemony in terms of their substantial theoretical correspondence to those they assumably hinge on, for example, realist or Gramscian hegemony. If any divergence is identified, it might turn out to be not just an exercise in conceptual discipline but a way of locating and "correcting" misreadings of hegemony within the sociology of IR, which might have affected the empirical data interpretation on par with the very research designs of the respective studies belonging to the subfield. Second, such an extensive review would also equip us with a set of conceptual tools, namely specific readings of hegemony on par with the corresponding auxiliary terms, like intellectuals in the case of Gramsci, suitable for fruitful conceptual transfer. In particular,

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<sup>15</sup> Pena 2018.

<sup>16</sup> Turton 2015.

<sup>17</sup> Jorgensen et. al. 2018.

what is meant is that if the misreadings of hegemonic traditions in and outside of IR might have negatively affected the subfield's ability to grasp the disciplinary dynamics empirically, why it cannot be the case that the careful and deeper rereading of the very same traditions turns out to point possible avenues for a more detailed empirical study of the discipline. Thus, as one can see, the ultimate goal of this work is conceptual and pertains to producing a set of better theoretical tools associated with disciplinary hegemony and, if lucky, a better comprehension of the disciplinary hegemony as such.

Yet and as a form of paying tribute to the subfield's convention of doing empirical research of new, namely earlier non-studied national IR communities, it brings forward empirically two thus far neglected national communities, namely the one of Belarus and the one of Ukraine. It uses three conventional methods of bibliometric analysis employed within the sociology of IR: author profile analysis, citation patterns analysis, and thematic content analysis. It merges the data from the latter two studies to bring methodological novelty. To say that the conceptual insights gained within the conceptual part are easily included in the conventional part of the subfield's empirical tribute is to exaggerate and mislead the reader overly. Instead, it suffices to say that various assumptions from the conceptual part would be given an exploratory evaluation throughout and at the end of the empirical part.

#### Structure of the work

The **first chapter** of this work acts as a limited historical introduction to the hegemonic problematique. Its primary goal is to "drive a wedge" into the conventional IR story of a direct linkage between the ancient Greek and realist traditions and the Gramscian and neo-Gramscian perspectives, as *well as their central position concerning theorizations of non-coercive domination*. It draws a line of similarity among the considered cases to oppose the disciplinary myth of the novelty and uniqueness of the (neo-)Gramscian view and apparent independence of the realist tradition. Moreover, it attempts to provide a different perspective on Gramsci's hegemony, as opposed to the typical IR story, namely that of mechanics and agents of hegemony. Finally, it aims to point out that hegemony is a concept that is much about post-Gramscian and "beyond Gramscian" thinking. The latter is achieved by covering hegemony's usage in post-Marxist and post-structuralist accounts of social theory.

The **first subchapter** of this chapter turns to the case of the *Russian revolutionaries*, namely Russian social democrats at the end of XIX and the beginning of XX centuries, and their usage of the concept of hegemony. The case of semantic borrowing from the ancient Greek tradition is highlighted, as well as Lenin's role in popularizing the term. The topic of hegemony's usage by the early ideologues of the Russian Revolution, such as Plekhanov and Potresov, is also covered. Specific attention in the **first subsection** is paid to the question of substantial and political differences between the Menshevik's and Bolshevik's usage of the term. In particular, hegemony as the leadership through class self-realization and hegemony as the political strategy of a power struggle is elaborated. Lenin's critique of the Menshevik position concerning hegemony is presented.

The **second subsection** turns to a detailed analysis of *Lenin's idea of proletarian hegemony*. The classical definition is given on par with the less "popular" passages touching on the issue of hegemony. The idea of hegemony as the form of leadership of a self-conscious political class is analyzed. The latter's dependence on the socio-economic context and "politically altruistic" character is highlighted. The mechanism and agents of the proletarian hegemony, advanced by Lenin, are described. In particular, his view on *stachka* as the primary mechanism for the broad societal rise of *class consciousness*. The latter two are presented as mutually dependent and co-constitutive factors leading to the

overall revolutionization of the societal plain. In addition, political agitation is offered as another mechanism of class hegemony, with a political *leaflet* being its primary element and leading us to Lenin's notion of the *political agitator*. Finally, the subsection ends with the notion of a "*hegemon of the hegemon*," namely Lenin's idea about the proletariat's political party.

The **second subchapter**, in turn, is preoccupied with a detailed analysis of the Gramscian "hegemonic heritage." The two primary conceptual transformations are highlighted: hegemony as a form of rule and the dialectical unity of coercion and consent within such an order. A significant emphasis within the **first subsection** is put on the Gramscian extension of the conceptual universe associated with hegemony. Specifically, the conceptual relation between the notions of state and civil society in the Gramscian writings is elaborated on within the **second subsection**. In addition, concepts of a historical block and the intellectuals are presented in the **third subsection**. The latter is presented in its connection to organic unison instead of mechanic unity. The notion of intellectuals is introduced as designating the articulators of hegemony, namely those "producing" societal stability. The **fourth subsection** looks into the Gramscian idea of active and passive consent.

The last subchapter of the first chapter, namely the **third** one, moves us to the socio-political reality of the second half of the XX century, making us focus on hegemony's usage by two distinct intellectual traditions, namely the world-system analysis, represented by Wallerstein and Arrighi, and the post-structuralist thinking with Laclau and Mouffe as its primary representatives.

The **first subsection** deals with *the discourse-oriented analysis of politics by Laclau and Mouffe*. The idea of the discourse as the foundation of the socio-political processes is explained. In particular, the Foucauldian basis of Laclau and Mouffe's theorizing is elaborated, with significant attention paid to the resulting difference in the political ontology. Specifically, the notion of hegemony in its relation to those of discursive totalities and fields is presented. The latter is achieved by introducing the idea of the empty signifier as a discursive center.

Moreover, the essential semantic void of the empty signifier is elaborated as its primary characteristic in the process of discourse formation. In other words, the semantic universality of the latter is presented as the driving force of the socio-political processes. Concerning the abovementioned issues, the issue of the successful bids for hegemonization and the nature of hegemonic discursive projects is explained. Finally, **the second subsection** concludes the first chapter with the *analysis of the World System Theory in its formulation by Wallerstein and Arrighi*. Basic definitions of the world system, world empire, and world economy are given. The economic nature of the global social interactions is explained, as well as the latter's connection with cultural and political processes. In this sense, Wallerstein's view of hegemony as an economic phenomenon is elaborated. The aggregate of the domestic industries' competitiveness and corresponding control of the markets share overlapping with a predominance within the ideological and military realms.

The **second chapter**, in turn, moves to the conceptual analysis of IR's usage of hegemony. Its primary goal is to problematize the disciplinary myth of the "realist vs. neo-Gramscian hegemony" by illustrating the variety of conceptualization of hegemony within IR, including the neo-neo couple as such. A short introduction is followed by a capsule rereading of the three attempts to systematize the existing body of IR literature concerning the hegemonic problematique.

The main body of this chapter starts with the **first subchapter** on the **realist** tradition of thinking about the international. In particular, with the subsections on *classical*

*realism* and its *structural* version. In the case of the classical strand, most of the attention is paid to Hans Morgenthau and E.H. Carr. When dealing with the case of Morgenthau, it touches on his understanding of hegemony as the opposite of the balance of power. In addition, such authors as Arnold Wolfers, Raymond Aron, and Nicholas Spykman are approached. At the end of the subsection, the case of the classical realism of E.H. Carr is brought under investigation. Specifically, it concerns his view of power, and by extension hegemony, as a synthetic phenomenon. After the subsection on classical realism, the work proceeds to the subsection on the structural strand of realism. Here the emphasis is put on elaborating the practical nullification of political semantics of hegemony by equating the latter with unipolarity, thus making hegemony a systemic attribute rather than a form of political rule. The two structural logics are traced in realists like Waltz, Mearsheimer, Betts, and Schweller, with particular attention paid to their operationalization of hegemony through the unraveled military power. The problematic character of such an equalization of hegemony and unipolarity is further analyzed through the works of realists. In particular, the realist version of the hegemonic stability theory, in its formulation by Kindleberger, is approached with a specific interest in his operationalization of hegemonic leadership through the framework of international stability provision, i.e., international public goods provision. This line of argument is further developed in approaching works by Lake and Gilpin, emphasizing hegemony as a way of overcoming systemic free-riding and the lack of cooperation.

The **second subchapter** of the second chapter moves on to the conceptual analysis of hegemony within the **neo-liberal** strand of IR theory. The latter's way of dealing with hegemony defines the subsection's preoccupation with issues such as the fungibility of power, domain-specific problems of power conversion, and the diversity of power structures under the seeming uniformity of the aggregate distribution of power. In particular, it is done by approaching such neo-liberal notions as complex interdependence, soft power, and international regimes. The explication of the relation between the latter three and hegemony accounts for most subsections.

Moreover, this subchapter includes three subsections about three specific notions/ideas within the neo-liberal strand that are conventionally employed as a "conceptual bundle" with hegemony. The first of these subsections deal with the notion of *international regimes*, further illustrating its relation to the one of hegemony. The idea of international regimes is analyzed as a result of a merger between those of non-fungibility of power thesis and issue areas claims. The second subsection of the second subchapter takes a closer look at Nye's notion of *soft power* in relation to hegemony. Finally, the third subsection of the second subchapter comes to the notion of *socialization*, or, to be more precise, *hegemonic socialization*.

After the conceptual analysis of hegemony in the neo-liberal strand of IR, this work moves to the same kind of analysis in the **third subchapter** concerning the *English School*. A general introduction to the ES's view on the international is given, with a particular emphasis on its *via media* approach. Its difference from realism is elaborated through the former's preoccupation with the social dimension of international politics.

The first subsection approaches ES's notion of *recognition*. For this purpose, the subsection inquiries into Hedley Bull's understanding of the sources of the international dynamics, namely the interactions between the Great Powers themselves, the Great Powers, and the rest of the international system/society. Subsequently, the subsection turns to Martin Wight. In this manner, some attention is given to Wight's formulation of hegemony as a mediatory factor in forming international norms through the idea of hegemony as the "significant other" to the one of international society. To compensate for the lack of conceptual clarity in the case of Wight, the subsection proceeds with Adam

Watson due to his “reputation” as an expert on historical instances of hegemony. His four-fold typology of control found within the international systems is presented.

Similarly, the work proceeds to the second subsection of the third subchapter, which brings in the idea of *hegemony as an institution* of the international system. The issue is covered by approaching Ian Clark’s attempt to advance the ES theory of hegemony by associating the latter with the institution of the international system. Moreover, Clark’s prospective categorical typology of hegemonies is briefly described.

Finally, the second chapter concludes with the **fourth subchapter** on the *neo-Gramscian conceptualizations of hegemony*. A general introduction to the neo-Gramscian perspective is given, and the latter’s heavy borrowing from the works of Antonio Gramsci is highlighted. Specific attention is given to Cox’s review and adaptation of several auxiliary concepts associated with hegemony: civil society, passive revolution historic bloc, transformismo, and intellectuals. The Coxian elaboration of four primary characteristics of neo-Gramscian hegemony is given: domestic character, multidimensionality, heterogeneity, and transnationality. The subchapter ends with the subsection on the Amsterdam School. Its conventional linkage with the neo-Gramscian perspective is explained and elaborated. The former’s peculiarity of dealing with hegemony unfolds in this subsection as a heavy focus on the transnational classes rather than state or institution-like entities. The intellectual sources of this focus are traced back to the school’s reliance on the works of Jurgen Habermas and his notion of concepts of control. Finally, a further elaboration concerning variations of conceptual adaptations about the Gramscian framework is given.

After a short conclusion concerning IR’s conceptualizations of hegemony, this work moves to the issue of disciplinary hegemony in the subfield of the sociology of IR. This **third chapter** is the apex of this work, not only intellectually but structurally. It combines the insights and analytical conclusions drawn from the previous subchapters and injects them into the *disciplinary hegemony/dominance problematique* of the respective subfield. In particular, it seeks to critically reapproach the existing conceptualizations of disciplinary dominance within disciplinary sociology. This rapprochement takes a two-fold character. Its first element assumes a *critical rereading* of the current conceptualizations with the backdrop of the abovementioned conceptualizations of hegemony in other intellectual domains. Its second element, in turn, attempts to put forward an alternative conceptualization of disciplinary dominance based on those conceptualizations of hegemony one could encounter in the preceding chapters of this work.

Similar to other chapters of this work, it starts with a short review of the state of the literature concerning hegemony, now, however, in the subfield of sociology IR. The latter review approaches four works in the subfield of disciplinary sociology, with each having the issue of disciplinary dominance/hegemony occupying a prominent place in the respective authors' conceptual and overall research framework.

After the reader gets a good introduction to the conceptual problematique addressed by the subfield, the chapter moves to its **first subchapter**, preoccupied with the problem of conceptual misreading and “misborrowings” by disciplinary sociology. The author elaborates on this problem by advancing two theses, namely those of “**Holsti’s curse**” and “**double self-referentiality**” of the sociology of IR. The former points to a conventional misreading of *The Dividing Discipline* by Kalevi Holsti, leading to the subsequent conceptual mistake while dealing with hegemony. The latter, in turn, adds an explanation for the conceptual problems associated with hegemony and the sociology of IR. Specifically, it concerns the fact that IR scholars in general, and those doing sociology of IR in particular, approach their discipline in the same manner as they approach the object of this discipline, namely the international. In other words, they use the terms and heuristic



logic associated with studying international relations to study their field and treat the latter as international.

With these theses in mind, the **first subchapter** approaches *two specific conceptual cases* associated with disciplinary hegemony. The first addresses a work by Wiebke Wemheuer-Vogelaar that attempted to advance a more nuanced measurement scale for disciplinary diversity as a corollary of the absence of disciplinary hegemony. As a result, it is shown that although the work develops a better framework for operationalizing disciplinary diversity, i.e., it advances a methodologically more elaborated approach, it effectively adds nothing to the substantial question of the presence/absence of disciplinary hegemony. The argument is advanced that this is due to the conceptual foundations of this work, namely its neglect of the latter concerning hegemony, and a heavy, although not explicitly stated, apriori reliance on the *equalization of hegemony with monopoly*. In this sense, the disciplinary dominance/hegemony question is narrowed down to the search for a proper “structural” framework of operationalizations. In other words, the problem is not the meaning, mechanisms, arenas, logic, or agents of hegemony but the structure of aggregate attributes assigned to academic articles, syllabi, conference presentations, etc.

In the second conceptual case study, this subchapter approaches the work of Helen Turton, conventionally regarded as the core one if it comes to the substantial conceptualization of disciplinary dominance. Moreover, similar to this work, Turton was motivated by the evident conceptual disarray in disciplinary sociology. However, as the subsequent analysis illustrates, her strategy of compensating conceptual clarity with the empirical scope did not allow her to avoid the conceptual pitfalls associated with Holsti’s curse and double self-referentiality. On top of that, and this issue guides most of the respective subsection, her attempt to build a more nuanced conceptual framework by turning to the (neo-)Gramscian conceptualization of hegemony results in nothing more than just an instance of prestige referencing. To stipulate further, it becomes the primary problem of her work, with various issues arising from this prestige borrowing of a conceptual framework, which she did not adequately transform. The former cases are analyzed and illustrated in detail in the respective subsection.

After finalizing the abovementioned conceptual case studies, this chapter comes to the structural and substantial apex of the whole work, namely the part on *hegemonic analogies*. The **second subchapter** contains five elaborations on the possible conceptualizations of disciplinary hegemony. Each is a result of the adaptation, and conceptual transfer of perspective’s on hegemony considered throughout this work. The first, found among the **first subsection** on the *non-IR hegemonic analogies*, deals with the Gramscian analogy and, by extension, the neo-Gramscian one. It proposes the idea of the disciplinary state-civil society complex, with each element defined by specific functional and organizational characteristics. The latter range from the character of norms and hierarchies IR scholars have to follow to those related to disciplinary knowledge production. Moreover, the idea of the disciplinary intellectuals, the historic block, is elaborated, with the former ascribed the situational-functional role rather than a pre-scribed attributive one. Finally, the idea of disciplinary consent is elaborated, with its critical elements of passive consent and contradictory disciplinary common sense.

The *post-structuralist analogy* for disciplinary dominance deal more with the issue of discursive power and the substantial content of the disciplinary discourse. In this sense, the disciplinary hegemony was equalized with one’s ability to create chains of semantic equivalences among neutral and contradictory statements. This ability was primarily linked to the notion of the disciplinary empty signifier and its crucial role in disciplinary hegemonization. In addition, the *WST analogy* for disciplinary sociology was presented. Its primary focus revolved around the disciplinary development lag, as well the modes of

disciplinary production. Similar to the case of the Gramscian analogy, the transnational and heterogenous character of disciplinary hegemony was highlighted.

The conclusive set of analogies in the **second subsection** deals with those derived from the corpus of IR theories. In particular, the *realist analogy* leads to a peculiar assumption regarding the stability provider role of the disciplinary hegemony and the basis of the latter in one's ability to provide disciplinary public goods. The latter range from the maintenance of international publishing outlets to ensuring the existence of a common disciplinary language. Moreover, the very critical idea regarding the periphery's role as a data provider, not capable of theory development, is reformulated as the hegemonic burden thesis, namely that the periphery is akin to the free-rider who can enjoy all the fruits of the core theory without investing in it any of its resources. Moreover, the introduction of the disciplinary orthodoxy is conceptualized as a form of disciplinary public good aimed at maintaining international disciplinary stability.

The *neoliberal hegemonic analogy* allows for the following reconceptualization of disciplinary hegemony. In this reconceptualization, disciplinary hegemony is seen as a primary position within the network of disciplinary co-dependencies with other IR communities or groups of IR scholars. In other words, one might speak of one's relative position in the web of the disciplinary public goods provision, namely what kind and quantity of those "goods" an IR community can "produce" and "supply" on par with the "demand" for those from other IR communities; its position within the "issue-specific" international disciplinary regimes understood in terms both its ability to preside over a framework of disciplinary costs and benefits distribution and establish rules and norms governing respective disciplinary issue areas; and the exclusive character of the public disciplinary good provided by the former IR community. Moreover, following Keohane, the idea of international disciplinary regimes is elaborated as composed of disciplinary principles, norms, rules, and procedures. Those three elements revolve around a specific international issue area, thus making it neatly correspond with the thematic, disciplinary divisions according to substantive focus or issue areas. In such a way, we speak about the international disciplinary regime as identical to its thematic sub-fields, such as IPE, foreign-policy analysis, or even international political theory.

The *ES analogy*, in turn, brought in two additional elements concerning disciplinary hegemony. First, it problematized the conventional notion of disciplinary consent even further, conceptualization as scholarly emulation. The latter was reconceptualized to include various types of consent depending on the context, reasons, and outcomes of the scholarly emulation. In this sense, disciplinary hegemony was associated with emulation with recognition. The latter implies conscious emulatory practices due to the acknowledgment of the substantial development and quality gaps between the peripheral and core scholarship. At the same time, it was opposed to the notion of emulation with recognition, which, in fact, better suits the conventional definition of disciplinary coercion, thus pointing one more time at the problematic character of the existing conceptualizations of disciplinary hegemony.

The **fourth chapter** contains two empirical case studies of peripheral scholarship by approaching the publishing patterns of IR journals in Ukraine and Belarus. A broad description of the methodologies employed is given. Similarly, the data collection process is explained, and general data set demographics are shown. Specific attention is paid to the issue of citation practices and their meaning for the citation analysis.

It starts with analyzing several demographics concerning the author-level attributes of the journal publications. Several characteristics of the Ukrainian IR are described: pronounced gender inequality, metropolitan type of publishing participation, and low levels of disciplinary internationalization, i.e., publishing insularity. The Belarusian IR

community, in turn, is attributed with a slightly different set of features: gender neutrality, metropolitan publishing, low levels of disciplinary internationalization

Following the conceptual part of this work, this chapter aims to generate several empirical insights. First, it tests the US/Western dominance thesis by looking at the distribution of references in the respective journals and paradigmatic orientations of a local scholar with the help of content analysis. Apart from testing the regional hegemon and CEE's regional IR theses, it tests several assumptions regarding the hegemonic analogies derived in the preceding chapters. It concerns the role of the language as a tool for preserving disciplinary underdevelopment, issue-area citation patterns, and the heterogenous character of hegemon claim.

#### A short methodological statement

The synthetic character of this work defines not only the eclectic collection of topics, issues, and authors covered but the fragile and open-for-critique methodological approach. In particular, it concerns this work's simultaneous quest for the historicity of the concept, which is reflected in the first chapter on the history of hegemony. The latter chapter lags behind the standards of conceptual historiography, not only in terms of its logic of narration, choice of authors, and sources, but the semantic focus as well.

A similar situation might be observed in the case of the conceptual analysis of hegemony's place in IR's theoretical tradition. The second chapter, entitled with the latter task, may be quickly criticized for omitting significant instances of IR theorizing involving the concept of hegemony. Moreover, one might blame the character and quality of the abovementioned analysis on the grounds of avoiding much of the actual content and technicalities of the respective works and their position in the disciplinary, theoretical landscape. The third chapter appears to be the most defenseless against the reader's critique. Even its detailed coverage of the hegemonic problematique within several works on the sociology of IR can be charged with omitting most of the works "blossoming" in the subfield of disciplinary sociology. Moreover, its backbone and heuristic apex, namely the logic of hegemonic analogies, is the weakest part of the methodological chain being on the brink of sensationalist and groundless assumptions. Finally, its last chapter, where two peripheral IR communities of Belarus and Ukraine approached empirically, ironically appears to be the most protected from the reader's intellectual indignation.

As one might see, the whole methodological edifice of this work is tripartitely composed of elements of conceptual history and conceptual and bibliometric analyses. However, neither the latter elements nor the central concept of this work, namely hegemony itself, justify the abovementioned weaknesses of the work or the very rationale of bringing them together. In other words, disregarding the author's ability to master the skills associated with the abovementioned methodological approaches, the question remains, namely, why there is a need to bring in all of the latter approaches together, and what is the substantial linkage between them, or what is its ultimate goal.

Thus, a good excuse for this research licentiousness is required. Luckily, it is out there, waiting to be put forward. The first element of its methodological apology is the work's character, which is *critical*. The latter critical character finds itself in the work's attempt to *destabilize* the existing conceptualizations of disciplinary hegemony in the sociology of IR. This destabilization turns out to be temporal (conceptual history), intra-disciplinary (conceptual analysis), imaginative (conceptual analogies), and spatial (bibliometric analysis). The second element of its methodological apology is *reflexive*. This *reflexivity* expresses itself not only in the object of study, namely existing conceptualizations of hegemony in and outside of IR but also in the *audience addressed*, namely those doing disciplinary sociology and preoccupied with the issues of scholarly

dominance and inequality. It is only within and in relation to the sociology of IR that this work has value and makes good sense. The final element of the methodological apology is *exploratory*. This element expresses itself in a complete lack of methodological beacons that guide one quest for novel conceptualizations. Moreover, in contrast to the conventional empiricism and normativism of the subfield, the very conceptual approach of this work is a risky business both in terms of outcomes and reception by the audience.

Thus, only if one considers the abovementioned justifications the form and content of this work appear to express a sufficient degree of coherency, purposefulness, and clarity. Only in this case, this work's quest to advance a better and more substantive conceptualization and, consequently, understanding of disciplinary hegemony stands a chance for recognition of achievement.

## Chapter 1. The “history” of hegemony

### Introduction

Although the title of this chapter gives a false promise of providing *a history* of hegemony, the reader should be cautious of putting her trust in the author. This is so because what follows is less a history of the concept but a review of the term’s usage outside and before what became referred to as the academic study of international relations, namely the discipline of International Relations. Moreover, it does not pay attention to the cases of German historians and the Ancient Greek hegemonic tradition, which are occasionally and superficially mentioned throughout the work. The historicity of the narration expresses itself in the sequence of subchapters dealing with various usages of hegemony. Unfortunately, this might be the only substantial connection with the *historic* analysis. What follows this introduction is not a history of the concept’s “development” but rather a sketch of the various forms and meanings the term had acquired throughout the last century and a half with corresponding socio-political and cultural contexts affecting the latter transformations.

Put differently and further specified, this is not a history of the concept per se, like the one found in Anderson’s interrogation of the term’s usage throughout the recently recorded human history<sup>18</sup> or the one found in James Martin<sup>19</sup> and devoted to the political theory realm. Instead, it is more of an “extra-disciplinary” account of the term, linked to the Gramscian conceptualization of the latter. Yet again, in a specific manner – neither a proto-history of the concept going into the details of the Sumerian or Accadian politics and ending up with the American hegemony in the face of the XXI century multipolarity nor a detailed pursuit of its semantical evolution before the advent of the American “social science.”<sup>20</sup> Instead, this is more of an attempt to provide an anti-history of the concept usually encountered in most IR textbooks and articles’ literature review sections. Moreover, one must be cautious not to take this claim at its face value – the “anti” character of the “historical” analysis of the term’s usage is strongly and paradoxically linked to the disciplinary history of IR, or better to say, the conventional disciplinary narrative about hegemony and its usage. In particular, it advances its antithetical style in the following manner.

First, it elaborates the notion of the hegemony of the proletariat in its subsequent connection with the Gramscian one to draw a line of similarity between all the traditions in a way that opposes the conventional story about the novelty of the former’s approach to consensual domination and refocuses on the more important innovations of Gramsci, primarily associated with the mechanics and agents of hegemony.<sup>21</sup> Second, it shows something about hegemony after and beyond Gramsci and his IR adepts within the neo-Gramscian strand of IR theory, namely various perspectives within post-Marxism/ and post-structuralism.<sup>22</sup> The excessive number of “post” prefixes is justified by showing that neither Gramsci, Cox, nor Overbeek represent the “end of history” concerning hegemony but rather stand in one of the various branches of the intellectual tree that runs parallel to human history itself.<sup>23</sup>

The method of this chapter, apart from being essentially a literature review, or a simplistic conceptual history, depending on what kind of terminology one prefers,

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<sup>18</sup> Anderson 2017.

<sup>19</sup> Martin 2022.

<sup>20</sup> Hoffmann 1977.

<sup>21</sup> Fontana, 2008.

<sup>22</sup> Godiwala, 2007; Ives 2005; Howarth 2015; Chakrabarty, 1998; Spivak, 2003.

<sup>23</sup> Overbeek 2005; Overbeek and Van der Pijl, 1993; Cox 1983.

expresses itself in its structure of narration. The latter prepares the reader for the final comparison and analysis of the historical evolution of the term's usage through a series of conceptual historical case studies. Those, in their turn, aim at destabilizing the conventional dyads of material vs. ideational power and coercive vs. consensual domination.

### 1.1. The Russian Revolutionaries

The case of Russian Revolutionaries presents a particular interest to this work, not only because of its implicit presence in Gramsci and the latter's permanent references to Illich but also due to their role in "normalizing" and "popularizing" the term. It preserved some connection to the Greek word, highlighting a hegemon's commanding and leading role; however, it transformed its application from the international realm to the domestic political one. The conventional story points to Lenin as the author of the contemporary Marxist "flavor" of the term; however, if there is someone to be given this praise, it is Georgi Plekhanov. A former "*Narodnik*," who "converted" to orthodox Marxism while in exile abroad, was the first to use the idea as pointing to the revolutionary processes in Russia in the mid-1880.<sup>24</sup> He connected the term to the assumption that the working class has to provoke a bourgeois-democratic revolution in Russia because of the weakness and inconsistency of the emerging bourgeoisie. From him, those other ideologues of the Russian Revolution had borrowed the term, including Lenin himself, mediated by Pavel Axelrod and Nikolay Potresov.<sup>25</sup> The latter two slightly reformulated the term associating it with the leading role of the Russian social democrats among other democratic forces in the overall struggle against Tsarist Absolutism.<sup>26</sup> Yet, we must acknowledge Lenin's role in popularizing the term and filling it with "practical" revolutionary content, which subsequently accounted for its popularity and served as a starting point of discussion for Gramsci.<sup>27</sup>

#### 1.1.1. Mensheviks and Bolsheviks: individual autonomy or collective strategy

The leading revolutionary class thesis was more of a standard line of interpreting the proletarian hegemony among Russian revolutionaries; however, some views were already divergent. The RSDP convention not only served as a turning point in the party politics itself and was not much about the latter but revolved around defining the hegemony of the proletariat in terms of the revolutionary strategy of the party. Here the dividing line was between the Menshevik faction of the party with Axelrod, Martov, and Trotsky and the one of the Bolsheviks with Lenin as its primary speaker.<sup>28</sup>

The Mensheviks were more preoccupied with the external expression of proletarian political activities, i.e., political agency, to build up and solidify the class consciousness of the working people through their direct and real-life collision with the political activities of the bourgeoisie. In this sense, when one speaks of the independence mentioned above of the proletariat as a necessary step to and an expression of the latter's hegemony, what is assumed as a revolutionary idea is linked to the notions of individual autonomy and self-emancipation, thus making the ultimate goal of hegemony to be achieved through the enlightened pedagogy of the party.<sup>29</sup> In turn, the Bolsheviks linked the same issues to the strategic realm of the political struggle over state power. In this case, the expression of the proletarian hegemony was equated not with a conscious political collision with the

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<sup>24</sup> Mayer 1993, p.259.

<sup>25</sup> Ibid., pp.269-270; Lester 1995, p.4.

<sup>26</sup> Lester 1995, p.4; Sochor 1981, p.72; Anderson 1976a, p.79.

<sup>27</sup> Del Roio, 2022.

<sup>28</sup> Brandist 2015, pp.25-32.

<sup>29</sup> Shandro 2014, p.166.

bourgeoisie but rather through a collective and organized character of this collision adjusted to the strategic political situation.<sup>30</sup>

The conventional narrative of this difference would point to the Menshevik's inclination to secure the proletarian hegemony through educating and raising the leading intellectual fraction of the proletariat, which had to substitute the radical intelligentsia, thus securing the fulfillment of the proletarian class interests. At the same time, the Bolsheviks, and Lenin as their tribune, are presented as preoccupied with securing the proletarian leadership in the course of the armed uprising against Russian Absolutism.<sup>31</sup> Suppose the two are assessed against each other. In that case, we see not much difference in the operationalization of the meaning of hegemony but rather a very different understanding of the latter.<sup>32</sup>

As such, the Mensheviks were focused on establishing the proletariat as the primary oppositional entity, which through a publicly visible and independent political action, becomes conscious of its class interests – which is their historic mission of bringing in the socialist revolution; the latter consciousness was understood as an understanding of the fact that one is capable of following its interests even if the circumstances appear to create the illusion of heteronomous context.<sup>33</sup> Thus in their view, there is no real need for a profound elaboration of a strategy for the collective revolutionary action since, if entitled to this kind of consciousness, the proletariat will be able to act with the unity of purpose, leaving the organizational issues to the secondary context of the revolutionary struggle.<sup>34</sup> Their reasoning is essentially based on the conflation of the two senses of the basis of hegemony, i.e., the proletarian self-consciousness, namely the collective and individual.<sup>35</sup> While even the personal autonomy perspective of Mensheviks is not without self-contradictory elements, the main issue is that if one turns to the collective self-consciousness, in its self-emancipatory aspect, then it is virtually impossible to speak of the proletarian hegemony since its collective form, in terms of class unity, requires solid organizational structures and frameworks of decision-making.<sup>36</sup> Subsequently, this leads to an ironic situation while preserving their theoretical and programmatic loyalty to the concept of proletarian hegemony; with the First Russian Revolution ending, they had to align themselves with Kadets.<sup>37</sup> Yet this is not the primary issue here. Still, it is one of a different kind: with this “strategy,” although acquiring flexibility in terms of operationalizing their path to hegemony through the form of proletarian self-activity depending on the current political circumstances, the problem was that the political actions of others shaped the latter circumstances, and the Mensheviks had to react and adapt to it, rather than define the latter themselves.<sup>38</sup>

The Bolsheviks, in their turn, were more preoccupied with the proletarian hegemony as related to political power concentrated in the state, thus shifting from self-activity and self-understanding of a class to the struggles over defining the consciousness of other societal groups, i.e., classes.<sup>39</sup> In this sense, hegemony appears to be about seizing and holding the initiative in determining the goals and content of the political process defined in terms of class interests.<sup>40</sup> Moreover, the permanent struggle for hegemony makes the task of defining the scope of a specific path to hegemony and its maintenance a

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<sup>30</sup> Boothman, 2008.

<sup>31</sup> Ghosh 2001, p.29.

<sup>32</sup> Shandro 2014, p.166.

<sup>33</sup> Shandro 2014, p.194.

<sup>34</sup> *Ibid.*, p.195.

<sup>35</sup> *Ibid.*

<sup>36</sup> Dan 1970, p.261.

<sup>37</sup> *Ibid.*, p. 262.

<sup>38</sup> *Ibid.*, pp. 392-394.

<sup>39</sup> Getzler 2003, pp. 134-135.

<sup>40</sup> *Ibid.*

futile endeavor since every move of the opponent changes the context and requires a detailed and context-specific reformulation of the strategic action; that's where the role for the proletarian party comes in, namely that of the organized collective guide for the proletarian political activity within the context of ever-changing circumstances.<sup>41</sup>

Overall, the events of the first Russian revolution made Lenin depart from the auxiliary theoretical and party politics' stance on the issue of hegemony Lenin and argue for a different understanding of the proletariat's role in the struggle against Tsarist Absolutism.<sup>42</sup> He conceived the Mensheviks' position as an attempt to inflate and distort the ideologo-strategic basis of the revolution, i.e., instead of associating hegemony with the active role of a class in a revolutionary process, they were searching for the lowest common denominator for coalition formation.<sup>43</sup> Subsequently, on the eve of WWI and closer to the February Revolution, Lenin used the Menshevik departure from the idea of proletarian hegemony as a pretext to proclaim them as enemies of the progressive revolution.<sup>44</sup> Moreover, the First Russian Revolution events made Lenin pay more attention to the issue of the collision of revolutionary interests and projects. In this slow shift of focus on Lenin's side, one can spot clear hints on the future policy of the revolutionary dictatorship of the proletariat rather than hegemony.<sup>45</sup>

When the Mensheviks proclaimed the abandonment of the proletarian hegemony task, at least in its initial formulation by Plekhanov and Axelrod, and Martov later on, the Bolsheviks seized the moment to accuse the former of betraying the Russian revolution due to their view of the proletarian hegemony as a mere historical intellectual contingency, disregarding the fact there is almost no realistic chance for a progressive combination of forces within the Russian society, thus making a truly democratic revolution close to impossible.<sup>46</sup> In this situation, narrowing down the proletariat's socio-political role to building a party serving specific class interests was to abandon the whole emancipatory project of Marxism.<sup>47</sup> However, the historical context did not allow the Bolsheviks to successfully implement the proletarian hegemony as the revolutionary strategy till the February Revolution of 1917 – only with the overthrow of the Russian Tsarism was there an opportune moment for the latter kind of extreme action.

### 1.1.2. Lenin: political press, tribunes, and the party

There is no surprise that most of the writings on hegemony point to Lenin as the primary “associate” of hegemony in pre-Revolutionary Russia – although it was not him who coined the term and gave it the starting political “impulse,” he, nevertheless, gave it a complete form and explicated its mechanics, intuitively accessible to the ordinary reader, and ready to be absorbed by the upcoming generations of Marxist revolutionaries around the world, Gramsci being among the latter. What is meant here is a redefinition of the practical meaning of the proletarian hegemony, from a mere leading-class role stemming from the internal transformations of the proletarian consciousness and search for alliances among the other revolutionary forces instead to a self-sufficient, proactive orientation to the business of the progressive political and social change, be the latter conceived in socialist and general democratic terms.<sup>48</sup>

Thus far, it mainly was a sketch of who introduced the term into the Russian Revolutionary vocabulary and how the internal debate evolved. There was hardly a chance

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<sup>41</sup> Lenin 1977, vol.13 p.115.

<sup>42</sup> Ibid..

<sup>43</sup> Ibid., vol.8 p.79.

<sup>44</sup> Lenin 1977., vol.20 p.267.

<sup>45</sup> Ibid., vol.13 p.128.

<sup>46</sup> Anderson 1976b.

<sup>47</sup> Lester 1999, p.41.

<sup>48</sup> Lenin 1972, vol.34 p.56 as cited in Anderson 2017, p.15.



to get a clear “practically” operationalized meaning of the term, as used by the Russian Social Democrats, with only an implicit and too abstract understanding of the term’s semantics being given, with its strategic meaning, complementary terms, and ideas almost wholly omitted. Here, one might find an attempt to close this gap, although the one confined to Lenin’s views.

The most famous definition of proletarian hegemony by Lenin goes as follows: “[*hegemony*] is the political influence which that class (and its representatives) exercises upon other sections of the population by helping them to purge their democracy (where there is democracy) of undemocratic admixtures, by criticizing the narrowness and short-sightedness of all bourgeois democracy, by carrying on the struggle against “Cadetism” (meaning the corrupting ideological content of the speeches and policy of the liberals), etc., etc.”<sup>49</sup> On another occasion, Lenin gave a similar definition, semantically close to the previous one, yet with more emphasis on the moral and revolutionary role-model qualities of the leading class, i.e., the proletariat.<sup>50</sup> In this reading, it is clear that, for Lenin, hegemony was associated with the political leadership of the proletariat. The source of the proactive character of this leadership was to be found in a specific disposition of socio-economic factors, which made the proletariat the most self-conscious and aware of the capitalist exploitation class in Russian society. It is not only that the proletariat is the most politically active class but also the one that has a good sense of revolutionary smell, i.e., able to distinguish actions, proposals, and ideas that contribute to the business of the progressive revolution, from those which might divert the oppressed classes from their way to emancipation.<sup>51</sup> Moreover, this self-consciousness implies not just the pursuit of class interests but is intimately linked to appreciating and striving for the liberation of all exploited classes and groups in a society, thus introducing a degree of political and social “altruism” characteristic of the hegemonic class, namely the proletariat.<sup>52</sup> In this sense, we might say that, for Lenin, hegemony is closely linked with the ability of a class to “objectively” assess the politico-economic reality of a society and target the institutions and practices that uphold the overall social inequality, injustice, and exploitation.<sup>53</sup>

Suppose there is no reasonable doubt concerning the connection between hegemony and political leadership of a class; the means, mechanisms, and agents of the former are still unclear or put differently, and the question remains of how proletarian hegemony is achieved. First, it is a strike (*stachka*) that transforms from an economic form to the political one. In the beginning, the economic strike initiated by the working class “awakens” other social groups making them put forward and fight for specific economic demands; in this joint fight, the proletariat comes in “contact” with other exploited groups of society, thus increasing its influence over the latter groups and its own revolutionary “consciousness.”<sup>54</sup> When the critical mass of the last two factors is achieved, the economic strike acquires political character since the political motto of the proletariat “infiltrates” other social groups; moreover, there is a backward linkage since the political agenda of the proletariat is reformulated to accommodate democratic demands.<sup>55</sup> Although this alliance would be formed within the framework of the bourgeois of other fractions of the society, ultimately, the revolutionary ideas of the proletariat command the whole society and address the socio-political issues of exploitation of the entire societal fabric. We arrive at a

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<sup>49</sup> Lenin 1977, vol.17 p.79

<sup>50</sup> Ibid, vol.18 p.410.

<sup>51</sup> Lenin 1977, vol.18 p.410.

<sup>52</sup> Volin 1970, pp.32-33.

<sup>53</sup> Lenin 1977, vol.5 p.342.

<sup>54</sup> Volin 1970, pp.32-33.

<sup>55</sup> Ibid.

politico-economic strike that relies on the proletariat's political agitation, leading to the revolutionary situation.<sup>56</sup>

Second, as the previous passage shows, the political agitation unfolds twofold. First, it is the press – without the proletarian political newspaper, achieving the latter's hegemony is nearly impossible. In contrast, the political leaflet plays a similar role in reaching out to the whole of society, not just its proletarian part.<sup>57</sup> Finally, the political agitator is the leader and “organizador” of the masses in his “social vicinity.”<sup>58</sup> Third, the proletarian party acts as a “hegemon of the hegemon.” For Lenin, the proletarian hegemony is unthinkable outside the proletarian political party since the former implies a need for high levels of political organization – this, in turn, is achievable only if the proletarian party is in place.<sup>59</sup> The theme of the proletarian party also includes two critical sub-issues, explaining the path to proletarian hegemony, and closely connected with the case of political agitation. First is the party's political program, which allows the expression of the aspirations of the proletariat, which also includes those of other parts of the society, and proposes a clear path for the future development of a society. The success of this program is based on the party's ability to find common ground between the “societal experience” of the masses and the latter program. Second, and connected to the case of the political agenda, is the issue of the political slogan – it is of crucial importance for the proletarian party to be able to convert its program into a capsule and comprehensible motto.<sup>60</sup>

In terms of the content of the proletarian hegemony and its expression as the political influence over other classes of a society, it had been thought of as taking several forms in parallel with the changes in the political situation of Russian society. First, it was supposed to mean support for the scattered and unsystematic political actions of the democratic bourgeoisie; subsequently, when the society reached the pre-revolutionary stage, the proletarian hegemony was thought of as taking the form of criticism and opposition to the liberal democratic project, on par with educating other classes on the pitfalls of the last project.<sup>61</sup> Finally, during the revolutionary stage, the proletarian hegemony was meant not only as an open fight against the counter-revolutionary liberal project but also acquired its complete “leading” form when the proletariat finally becomes the class that guides and directs the revolution – it does not only define the program of revolutionary action but the very image of the future society.<sup>62</sup>

When the February Revolution of 1917 opened up the opportune moment for implementing the proletarian hegemony, the Russian peasantry crushed the Provisional Government under the guidance of the Russian proletariat and its party, namely the Bolsheviks. Ironically, it made obsolete the idea of a revolutionary strategy where a small but energetic social force seizes the political power through bold action and skillful alliance with and guidance of the larger and more powerful classes, such as the peasantry. The problem is that the events of October 1917 superseded even Bolshevik expectations – this revolution was socialist, exceeding the limits of the bourgeois one expected by the latter and resulting in a direct transition to socialism; with this transition taking place, according to the Trotskian prediction, the hegemony of the proletariat was substituted with the dictatorship of the latter, as conceptualized by Marx.<sup>63</sup>

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<sup>56</sup> Ibid.

<sup>57</sup> Ibid, p.34.

<sup>58</sup> Lenin 1977, vol.5 p.423.

<sup>59</sup> Ibid., vol.4 pp.175-176.

<sup>60</sup> Lenin 1977, vol.20 p.459.

<sup>61</sup> Volin 1970, pp.32-33.

<sup>62</sup> Ibid.

<sup>63</sup> Anderson 2017, p.18.

## 1.2. The Italian Revolutionary

Regarding Gramsci, it is hardly possible to limit oneself to a capsule review of his writings and his usage of hegemony. This task is achieved through a tremendous loss of meaning and context regarding his theoretical universe. Moreover, his writing style, which is commonly held to avoid the prison's censorship, makes this task even more complicated since there is not a line in his Prison Notebooks that did not become a bone of contention among the commentators of his works.<sup>64</sup> However, suppose one takes the Russian Social Democrats and the ancient Greek usage as a point of comparison and avoids digging into his assumptions' ontological and epistemological context. In that case, the task becomes more realistic and somehow achievable.

The first innovation about hegemony was Gramsci's generalization of hegemony as a particular form of rule. While for the Russian democrats, hegemony was seen as a revolutionary strategy of a specific class within specific conditions, Gramsci nullified the strategic and the particular class connection.<sup>65</sup> In such an understanding, hegemony is associated with any class, be it the peasantry or the bourgeoisie, and relates to a stable political rule of one group over the others. This shift is usually ascribed to his ability to spot the difference between the socio-political conditions in Tsarist Russia and the Western European countries.<sup>66</sup> In the latter's case, the socio-political environment coincided with the ability of the bourgeoisie to effectively revolutionize their societies, thus nullifying the need for any consensual strategic alliance with other strata of their societies.<sup>67</sup> This overlap of structural conditions and agency resulted in the political order where the bourgeoisie could cement its rule over the whole of society, thus making Gramsci reverse the Russian focus of the concept to the bourgeoisie itself and change the prescriptive connotation of the concept to the descriptive one.<sup>68</sup>

The stability of the resulting order made Gramsci transform the Russian version of the concept in another meaningful way: he moved the concept's semantics from pure consent to the dialectical unity of consent and coercion.<sup>69</sup> It is still an open question whether this was a result of his inductive reasoning based on the available historical material or whether it was, to a significant extent, defined by the long tradition of Italian political thought. For Gramsci, neither a political order based solely on coercion is stable in the long-run and prone to external political or economic shocks nor a consensual societal alliance.<sup>70</sup> It is only an implicit combination of the two that assures a significant degree of stability and solidity in the long run - not just a random combination of consent and coercion, but rather a balanced relationship between the two, where the latter does not exceed the former and is exercised within the context of the latter concerning the majority of the society.<sup>71</sup> This peculiar balance between coercion and consent makes the latter, as compared to the Russian debate, shift its semantics as well. Suppose for the Russian revolutionaries, the basis of consent was a common societal goal, as in the case of Gramsci. In that case, it subscribes to the societal agenda, which does not represent the common benefit.<sup>72</sup> More than this, the promulgated agenda damages the rest of society.<sup>73</sup>

Most likely, this balance between consent and coercion and periodic oscillation of the conceptual weight on the side of one or another brought so much debate among the

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<sup>64</sup> Anderson 1976b

<sup>65</sup> Adamson 1979

<sup>66</sup> Mancini and Galli 1968, p.333.

<sup>67</sup> Adamson 1979, p.45-46

<sup>68</sup> Ibid.

<sup>69</sup> Anderson 1976b

<sup>70</sup> Bates 1975, p.351-354

<sup>71</sup> Ibid.

<sup>72</sup> Buttigieg 1995, pp.27-28

<sup>73</sup> Ibid.

commentators.<sup>74</sup> While within the conventional narrative, consent is the basis of hegemony, which differentiates the Gramscian hegemony from all other conceptions of the term, some commentators still point to the determinant role of coercion.<sup>75</sup> In the latter case, consent exists as long and to such an extent as it is backed up by the repressive apparatus on the side of the dominant class. However, in terms of a strict frequency of usage, hegemony as consensual order predominates.<sup>76</sup> Anderson finds it as stemming from the fact that back then, there was hardly a Marxist who would be in need to reiterate the point that bourgeois rule is based predominantly on the control of the repressive forces within a society.<sup>77</sup> Thus, he sees Gramsci as a Marxist who attempted to clarify how this kind of order deals with dissent in non-repressive ways.

To put it differently, Gramsci approached the problem of acquiring the dominated consent to the very domination exercised. And in pursuing this task, Gramsci had to develop something close to a relatively coherent and extensive theory of hegemony.<sup>78</sup> Thus, this subsection aims to put the Gramscian concept of hegemony within a broader theoretical context found in the Prison Notebooks. This task can be achieved only by bringing in Gramsci's auxiliary conceptual apparatus and drawing links between the latter and his general view of hegemony as a form of consensual rule.

### 1.2.1. An extended conceptual universe

To reiterate, the Gramscian concept of hegemony reintroduces the dualist view of political control characteristic of Italian political thought,<sup>79</sup> namely the one between force and consent, and claims that the leading position of a social group is maintained through domination/coercion (*dominio*), or “intellectual and moral leadership” (*direzione intellettuale and morale*): “The methodological criterion on which our study must be based in the following: that the supremacy of a social group manifests itself in two ways, as “domination” and as “intellectual and moral leadership.”<sup>80</sup> A social group “dominates antagonistic groups, which it tends to “liquidate,” or to subjugate perhaps even by armed force; it leads kindred and allied groups.”<sup>81</sup> In other words, social control can be external or internal: the former stems from influencing behavior through rewards and penalties, while the latter aims to establish a link between the personal and the socially dominant worldview. This internal control is based on hegemony, which can be conceived as “an order in which a common social-moral language is spoken, in which one concept of reality is dominant, informing with its spirit all modes of thought and behavior.”<sup>82</sup>

Thus, in most interpretations, hegemony is located within civil society and operates through various institutions and associations. Their primary goal is to shape “desired” cognitive and affective structures individuals employ to approach and assess social reality. This kind of intellectual-moral leadership, despite its consensual nature and ethico-political scope, is still rooted in economic dominance: “[...] for though hegemony is ethical-political, it must also be economical, must necessarily be based on the decisive function exercised by the leading group in the decisive nucleus of economic activity.”<sup>83</sup> More than this, as Santucci highlights, Gramsci’s innovation, as compared to previous theoreticians and practitioners of class hegemony, consists in pointing to a temporal dimension of the

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<sup>74</sup> Anderson 1976b

<sup>75</sup> Ibid.

<sup>76</sup> Ibid.

<sup>77</sup> Ibid.

<sup>78</sup> Ibid.

<sup>79</sup> Ives, P., 2004, p. 28.

<sup>80</sup> Bobbio 1967 cited in Woolcock 1985, p.199.

<sup>81</sup> Gramsci 1971, p.57.

<sup>82</sup> Femia 1981, p.24.

<sup>83</sup> Gramsci 1971, p.161.

relationship between consent and coercion,<sup>84</sup> namely, the fact that the moral leadership must precede the advance to power in the material dimension: “A social group can and, indeed, must already be a leader before conquering government power (this is one of the main conditions for the same conquest of power); later, when it exercises power and even if it has firm control, it becomes dominant, but it must also continue to be a “leader.”<sup>85</sup>

Finally, if one follows Bobbio, it turns out that there is not much opposition between Lenin and Gramsci concerning hegemony: Leninist “political leadership” is an element of Gramsci’s “cultural leadership.”<sup>86</sup> On top of this, the real difference between the two is usually omitted, namely the one of the extension and the function of the concept: the former relates to the fact that hegemony embraces the whole of civil society (not just the party and allied groups, as is in the case of Lenin), while the latter points to hegemony’s ideational dimension associated with its world-view formation (compared to Lenin’s educative and transformative function).<sup>87</sup> Although the Gramsci-Lenin connection presents an attractive pedagogical image of continuity and succession in terms of “theoretical development” within Marxism,<sup>88</sup> one should not take it at its face value since a closer analysis might discover other avenues of “theoretical succession.” For example, Ives is quite confident that the typical discarding of Gramsci’s university coursework in linguistics, and his acquaintance with Bartoli, as theoretically inessential concerning his later views on hegemony, precludes the Gramscian scholarship from fully appreciating the ethical distinction between progressive and regressive hegemony.<sup>89</sup>

Moreover, the aforementioned classical distinction between coercion and consent might have a slightly different conceptual pedigree: “This basic conception of the center of linguistic and cultural power is what led Bartoli to ask how one people could conquer another not so much through the use of weapons, but rather by imposing customs and modes of thought. It is also at the heart of Gramsci’s use of “hegemony” in the prison notebooks to theorize the relationship and tensions between coercion and consent. [...] It was Ascoli, d’Ovidio, Bartoli, and other linguists who first introduced Gramsci to a method for investigating these dynamics of social control.”<sup>90</sup> The real brake-up with, and with regard to the previous Leninist tradition takes place when Gramsci “relocates” the concept’s foundation to the realm of the superstructure, and endows it with intersubjective universality, on par with reversing the “class focus” of hegemony: “This is the most purely political phase, and marks the decisive passage from the structure to the sphere of the complex superstructures; it is the phase in which previously germinated ideologies become “party”, come into confrontation and conflict, until only one of them, or at least a single combination of them, tends to prevail, to gain the upper hand, to propagate itself throughout society – bringing about not only a unison of economic and political aims, but also intellectual and moral unity, posing all the questions around which the struggle rages not on a corporate but on a “universal” plane, and thus creating the hegemony of a fundamental social group over a series of subordinate groups.”<sup>91</sup>

In Anderson’s view, it is the “desituated” way of writing, which is characteristic of Gramsci’s work, which allowed him to open up a new area of Marxist inquiry. This resulted from the ever-present censor’s vigilance and required an “indeterminacy of focus” in which the two antagonistic classes may alter their roles in the same passage without making it in any way contradictory: “The mask of generalization into which Gramsci was

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<sup>84</sup> Santucci 2010, p.154.

<sup>85</sup> *Ibid.*, pp.154-157

<sup>86</sup> Landy 1990, pp.157-158; Bobbio 1987 cited in Landy 1990, p.154

<sup>87</sup> Piccone 1976, pp.488-492.

<sup>88</sup> Ives 2004, p. 27

<sup>89</sup> *Ibid.*, p. 28.

<sup>90</sup> *Ibid.*

<sup>91</sup> Gramsci 1971, pp.181-182

thus frequently driven had serious consequences for his thought: for it induced the unexamined premise that the structural positions of the bourgeoisie and the proletariat, in their respective revolutions and their successive states, were historically equivalent.”<sup>92</sup> Thus, whether intentional or not, such way of writing led to a concept which now was possible to apply to the bourgeoisie as well, aiming at uncovering “the ins and outs” of its domination’s stability. In other words, the concept used to refer to the role the proletariat should play in a bourgeois revolution was now employed to designate a framework of bourgeois power over the proletariat within the State in the West.<sup>93</sup> Nonetheless, the very same “indeterminacy of focus,” as Anderson notes, led not only to a variety of quarrels over the “true” interpretation but also to widespread “abuses” of Gramscian concepts.<sup>94</sup>

### 1.2.2. Three models of Gramsci

For example, the case to the point mentioned above concerns the relationship between the state and civil society in *The Prison Notebooks*. If one follows Anderson’s view of Gramsci’s conceptual universe, it is possible to distinguish three primary configurations of the conceptual couple.<sup>95</sup> These configurations are labeled as models and represent likely overall perceptions of Gramsci’s view of the socio-political reality. The first is constructed from the passage on the difference between East and West. Although presumably written to differentiate the respective revolutionary strategies of the Eastern and Western cases, it still equips us with a coherent understanding of Gramsci’s conceptual framework.<sup>96</sup> Putting aside the differences between East and West, we can put forward several assumptions: first, the State and civil society are separate arenas for socio-political activity, and the latter is predominant over the former; second, civil society is associated with the cultural direction or consentient hegemony, while the State is the realm of coercive domination over the exploited classes; third, it is the cultural ascendancy of the dominant class that ensures the stability of the whole order; fourth, the basis of bourgeois power is the predominance of hegemony over coercion; fifth, hegemony means the ideological subjugation of the exploited class by the dominant one.<sup>97</sup>

This model, according to Anderson, contains one critical theoretical mistake, namely the division of the ideological functions of the dominant class between the State and civil society, since: “The fundamental form of the Western parliamentary State - the juridical sum of its citizenry - is itself the hub of the ideological apparatuses of capitalism. The ramified complexes of the cultural control systems within civil society - radio, television, cinema, churches, newspapers, political parties - undoubtedly play a critical complementary role in assuring the stability of the class order of capital.”<sup>98</sup> Thus it becomes clear that one should not underestimate the efficiency and importance of the institutions belonging to civil society and playing a role in establishing and maintaining hegemony; however, at the same time, the ideological position of the State itself should not be counterposed to them, not to say diminished.<sup>99</sup>

In his second model, Gramsci introduces several significant modifications: first, he does not ascribe to civil society the preponderance over the State anymore: they are now in a state of equilibrium; second, hegemony itself is being redefined, now includes both consentient and coercive elements; third, hegemony changes its “location” – from being concentrated within social society, not it is equally distributed between the political and

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<sup>92</sup> Anderson 176b, p.30

<sup>93</sup> Ibid., pp.9-10.

<sup>94</sup> Ibid., p.20

<sup>95</sup> Anderson 176b, p.25.

<sup>96</sup> Ibid., p.26.

<sup>97</sup> Ibid., p.27.

<sup>98</sup> Ibid., p.28

<sup>99</sup> Ibid.

civil society.<sup>100</sup> For Anderson, this model expresses Gramsci's awareness of the ideological role the State plays in maintaining the dominant's class power; however, this attempt brings even more conceptual contradictions than the previous one. This fact becomes evident if one considers the "relocation" of hegemony on par with its decomposition into coercive and consentient elements.<sup>101</sup> This co-presence of hegemony and its two-fold nature are in direct contradiction with a commonly shared thesis of Weber concerning the nature of the State as the only institution having a legal monopoly on the use of violence (coercion): "There is always a structural asymmetry in the distribution of the consensual and coercive functions of this power. Ideology is shared between civil society and the State: violence pertains to the State alone. In other words, the State enters twice into any equation between the two."<sup>102</sup> Thus, it turns out that it is impossible to speak of hegemony being equally co-present in civil society and the State since the exercise of violence is not legally institutionalized within the former.

Finally, the third model can be conceived as the result of an attempt to overcome the apparent limitations and contradictions of the previous models.<sup>103</sup> As Anderson notices, Gramsci radicalizes the conceptual fusion of the State and civil society already present in the last model: "By the State should be understood not merely the governmental apparatus, but also the "private" apparatus of hegemony or civil society."<sup>104</sup> Hence, the issue now revolves not around the location of hegemony, nor about its inner composition, but rather the merger of the State and civil society, when the latter is equalized with the former and disappears as a separate entity: "In reality, civil society and State are one and the same."<sup>105</sup> Thus, the notion of the State becomes, in its domestic application, likewise its international connotation, or in Marxist terms, it becomes associated with social formation.

### 1.2.3. Historical block and intellectuals

In Gramsci's conceptual framework, two terms are often misinterpreted or, in the best case, given insufficient attention – historical block and intellectuals. The former usually experience a twofold misinterpretation: being conceived merely as a class alliance on the large societal plain, and associated by default with hegemony, i.e., every historical block is hegemonic.<sup>106</sup> The latter is usually considered isolated from other notions of Gramsci's framework and conceived as a group of mere "molders" of consent and, consequently, hegemony.<sup>107</sup> Thus, it is not by accident that these two notions are considered in one subsection, for a clear connection between them is often overlooked.

First, suppose one wishes to comprehend the essence of the term historical block. In that case, it is necessary to look back at Gramsci's writing on the forms of political organization in the pre-modern and modern epochs.<sup>108</sup> The former period was characterized by the presence of neither a solid political nor social centralization - as Lester puts it, in some sense, the ancient and pre-modern state could be seen as a mechanical unit, containing heterogeneous and weakly linked among each other social groups: despite occasionally experiencing the dominant's class politico-military pressure, they kept separate social existence within specific social institutions.<sup>109</sup> However, there is a qualitative turn with the advent of the modern state, namely: "The modern state substitutes for the mechanical bloc of social forces their subordination to the active hegemony of the

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<sup>100</sup> Ibid., p.31

<sup>101</sup> Ibid., p.32

<sup>102</sup> Ibid., p.32-33

<sup>103</sup> Anderson 1976b, p.33.

<sup>104</sup> Ibid., p.34.

<sup>105</sup> Ibid., p.35.

<sup>106</sup> King 1975; Santucci 2010, p.155.

<sup>107</sup> Santucci 2010, p.154-155.

<sup>108</sup> Morton 2007, pp.601-613

<sup>109</sup> Lester 2000, p.64-64.

directive and dominant group ... [It] abolishes certain autonomies, which nevertheless are reborn in other forms as parties, trade unions, cultural associations.”<sup>110</sup>

Thus, as Buci-Glucksmann notices, the essence of the historical block unfolds only if inserted into the transition mentioned above from the mechanical block and the achievement of active hegemony on behalf of the dominant class.<sup>111</sup> Gramsci focuses on the historical block’s ability to provide an *organic unison* of social relations, as opposed to previous mechanical unity; however, what is precisely meant by organic, as opposed to mechanical? Gramsci maintains that actual politics are impossible without establishing a linkage between the progressive vision of the future and contextualization and understanding of the current feelings and passions of the masses.<sup>112</sup> The absence of such a linkage leads to a bureaucratic and formalistic order, which in no way may be designated hegemonic since hegemony stems from establishing an “organic cohesion.”<sup>113</sup> The latter is a situation when: “can there take place an exchange of individual elements between the rulers and the ruled, leaders and led, and can the shared life be realized which alone is a social force – with the creation of the “historical bloc.”<sup>114</sup> This passage from Gramsci points to the fact the historical block is something more than just an alliance-building; moreover, it becomes obvious that “comes out” of the historical block, but not every historical block can be labeled as hegemonic.

Thus far, another question arises, namely, the question of where from comes this organic unity. Who or what establishes this cohesion, or in Lester's words, “Who is going to act as the key *articulator* of hegemony?”<sup>115</sup> For Gramsci, it is the intellectuals – a social group, that is given: “the function of organizing the social hegemony of a group and its state domination.”<sup>116</sup> What was one of the most conceptually innovative moves made by Gramsci, at least within the Marxist current, was his extended definition of the intellectuals: “By “intellectuals” must be understood not those strata commonly described by this term but in general the entire social stratum which exercises an *organizational* function in the wide sense – whether in the field of production, or in that of culture, or in that of political administration.”<sup>117</sup>

In such a way, it becomes clear that for Gramsci, an intellectual is not just a *man of letters*, who exists in a social vacuum, and whose genealogy is independent of the past and current socio-historical conditions. The intellectual’s origin from a specific socio-historical context allows establishing a bow between their activities and the larger societal context relieved from “intellectual reductionism,” i.e., defining the intellectuals based on the type of labor the social group is involved in (manual vs. intellectual work). Instead, it becomes possible to determine its societal function in a meaningful way, rather than concentrating on “thinking” for the sake of “thinking itself”: “The mode of being of the new intellectual can no longer consist in eloquence, which is an exterior and momentary mover of feelings and passions, but in active participation in practical life, as a constructor, organizer 'permanent persuader' and not just simple orator.”<sup>118</sup>

The intellectuals act as unconscious “organizers” and “overseers” of society's intellectual and cultural landscape. The latter, in its turn, is not conceived through the lenses of economic reductionism, i.e., as being only a reflection of the predominant mode of production, but rather playing a significant role in maintaining the order stemming from

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<sup>110</sup> Gramsci 1971 cited in Buci-Glucksmann 1980, p.274

<sup>111</sup> Buci-Glucksmann 1980, p.274

<sup>112</sup> Ibid.

<sup>113</sup> Ibid.

<sup>114</sup> Gramsci 1971, p.418.

<sup>115</sup> Lester 2000, p.63.

<sup>116</sup> Ibid., p.64-65.

<sup>117</sup> Ibid.

<sup>118</sup> Gramsci 1971, p.10.



the relations of production of the current socio-historical formation. Moreover, their primary role is the maintenance of a linkage between the political and civil society. The social “origin” serves Gramsci as a basis for differentiating two types of intellectuals, namely organic and traditional.<sup>119</sup> The former is of primary importance for Gramsci since they are the product of the current social formation and are linked to the primary mode of production – they prepare the “grounds” for and “observe” the class shift from the corporatist way of thinking to the politico-ethical: “the capacity to be an organizer of society in general, including all its complex organism of services, right up to the state organism, because of the need to create the conditions most favorable to the expansion of their class; or at the least, they must possess the capacity to choose the deputies (specialized employees) to whom to entrust this activity of organizing the general system of relationships external to the business itself.”<sup>120</sup>

The traditional intellectuals have their role in Gramsci’s framework of analysis. They are defined as a specific type of intellectuals based on their existence before the establishment of the current social formation: “every “essential” social group which emerges into history out of the preceding economic structure, and as an expression of a development of this structure, has found (at least in all of history up to the present) categories of intellectuals already in existence and which seemed indeed to represent a historical continuity uninterrupted even by the most complicated and radical changes in political and social forms[...].”<sup>121</sup> This fact justifies claims concerning their historical permanency, autonomy, and independence from the dominant class.<sup>122</sup> Nonetheless, Gramsci finds himself unable to unmask this appearance of neutrality. In the best case, according to Gramsci, the traditional intellectuals have to compromise with the current social system due to institutional pressures or financial motives, thus making it impossible for them to stay above the “hegemonic struggle” within the system.<sup>123</sup> Their first-glance neutrality is crucial for the current hegemonic historical block since it helps the latter acquire a greater consensual homogeneity of its hegemony. Thus, any class aspiring to a dominant position in a society must be able to “convince” traditional intellectuals of the feasibility of its politico-ethical societal program.<sup>124</sup>

Thus far, we have dealt with a typology of intellectuals introduced by Gramsci and differentiated based on their “class genealogy.” However, the question concerning the object of hegemony articulated by the intellectuals remains – here, one has to return to the role played by the intellectuals in maintaining a sufficient degree of social cohesion. This cohesion, according to Gramsci, stems from a societal unity based on a shared conception of the social structure, which he designates as a *collective will*.<sup>125</sup> This notion introduces a degree of importance to the cultural aspect within the Gramscian worldview. It intertwines with various understandings of ideology by the latter Marxists – culture, at its different levels, unifies in a series of strata to the extent that they come into contact with each other, a greater or lesser number of individuals who understand each other's mode of expression in differing degrees: “[...]An historical act can only be performed by “collective man,” and this presupposes the attainment of a “cultural-social” unity through which a multiplicity of dispersed wills, with heterogeneous aims, are welded together with a single aim, on the basis of an equal and common conception of the world.”<sup>126</sup>

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<sup>119</sup> Ibid.

<sup>120</sup> Ibid., pp. 11-12.

<sup>121</sup> Gramsci 1971, pp 6-7.

<sup>122</sup> Ibid.

<sup>123</sup> Ibid.

<sup>124</sup> Crehan 2016, pp.18-20.

<sup>125</sup> Coutinho 2021, pp.128-133.

<sup>126</sup> Gramsci 1975, p.133 cited in Michelis 2018, p.154

#### 1.2.4. Consent: active and passive

It became somehow implicitly clear throughout the previous passages that hegemony is associated with consent. However, one must be cautious to avoid equalizing the two. The former should be considered an outcome of acquiring and maintaining the latter. However, how is consent produced? What are the means of developing and maintaining the latter? The easiest way to conceptually approach the issue is to focus on hegemony's location within civil society and the latter's function of «ideological indoctrination» of the exploited classes. However, this appears to be a moral or prescriptive view, and it does not tell us anything in particular about how and where this «indoctrination» occurs.<sup>127</sup> Looking at the positive educational function of schools, churches, and other civil society institutions and the negative educational role of courts, we remain on the surface of the problematique.<sup>128</sup> The crucial element here, however, is being able to establish a link between different forms of knowledge, or in Gramsci's words, the “conceptions of the world” their emanation in collective consciousness (*the common will*), and psychological-individual level: for Gramsci, in some of his passages, took a psychological stance on the issue of consent.<sup>129</sup> And this linkage is provided by the notion of language. As Femia interprets those passages, consent signifies “some degree of *conscious attachment to, or agreement with, certain core elements of the society.*”<sup>130</sup> To paraphrase Tamburrano, consent is an outcome of a permanent feeling of connection to the ideology of the State as an expression of the masses' beliefs and aspirations.<sup>131</sup> With this view of consent, language naturally becomes a practical tool for establishing and maintaining hegemony since: “[*language is*] a totality of determined notions and concepts and not just of words grammatically devoid of content” and “[...] great importance is assumed by the general question of language, that is, the question of collectively attaining a single cultural climate.”<sup>132</sup>

For Ives, language's intersubjective nature gives it a political meaning in reflections on Gramsci's hegemony.<sup>133</sup> In case there is precise control over the development of linguistic connotations ascribed to specific core notions like “justice” or “truth,” which help preserve societal unity built following the dominant's class perspective. It is extremely difficult for conflicting concepts and interpretations to be propagated among the masses.<sup>134</sup> In such a way, we arrive at a situation where even if there is dissatisfaction with the current state of affairs in society, there are still no “linguistic tools” to frame this dissatisfaction. Gramsci's focus on language's potential and role in establishing and maintaining hegemony is naturally linked to another of his concepts, namely *common sense*.<sup>135</sup> In general, common sense designates the whole sphere of uncritical human attitudes. For Gramsci, however, it is a way of trying to comprehend those ways and forms of unconscious thinking which aim at understanding an individual and the external world.

In particular, Gramsci considers common sense as a way of providing stability by appropriating historical ideas and adapting them to the contemporary context.<sup>136</sup> What is of tremendous importance is that Gramsci in no way equates or reduces common sense to the dominant class's ideology.<sup>137</sup> Nevertheless, the dominant class will be tempted to forge some “desirable” elements of common sense, and language is one of the primary tools

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<sup>127</sup> Patnaik 1988, p.2-3.

<sup>128</sup> Liguori 2021, p.125-126.

<sup>129</sup> Femia 1981, pp.36-37

<sup>130</sup> Ibid., pp.38-39

<sup>131</sup> Tamburrano 1958, p. 282 cited in Femia 1981, p.42-43.

<sup>132</sup> Gramsci 1971, p.323.

<sup>133</sup> Ives 2004, pp.63-101.

<sup>134</sup> Ibid., p.

<sup>135</sup> Crehan 2016, pp.43-45.

<sup>136</sup> Snir 2016, p.4.

<sup>137</sup> Femia 1981, pp.42-45.

here. The only way to free oneself from the dominant class worldview's shackles is to learn a new language, which will allow one to avoid the "semantic traps" of the old language.<sup>138</sup> This new language can be formed only if one can come up with a *good sense*; the latter, in its turn, comes as a result of being able to assess socio-political reality critically and comprehend the real needs and aspirations of the exploited classes: "[...] that is, by becoming a culture, a form of "good sense," a conception of the world with an ethic that conforms to its structure."<sup>139</sup> However, there are not only conceptual impediments associated with overcoming common sense but other problematic phenomena, such as *contradictory consciousness* – here, it may be said that Gramsci refers to the contradiction: "[...] between one's intellectual affirmation and one's mode of conduct."<sup>140</sup> Specifically, it refers to a situation when the *practical* activity of an individual may represent a clear case for dissatisfaction with the existing patterns of power distribution; however, it is not accompanied by the critical comprehension of the situation.<sup>141</sup> In other words, one may be dissatisfied with the existing status quo and act accordingly, although not equipped with proper terms and ideas to ascertain the current injustice.

Thus, according to Gramsci, one might say that the consent basis of capitalist power stems from these two phenomena, namely common sense and contradictory consciousness, which, in turn, are two forms of *passive consent*.<sup>142</sup> To further elaborate on the point, the assumptions mentioned above clearly indicate that the stability of capitalist power and efficacy of hegemony is not based on an *active* affirmation of the state of affairs; it is instead based on an effective exclusion and marginalization of possible alternatives.<sup>143</sup> And that's precisely the reason why Gramsci argues that almost all civil society institutions exist to strengthen and maintain the *common sense* of capitalism and discourage alternative perspectives through the control of conceptual and linguistic tools.<sup>144</sup> The notion of *active consent*, in its turn, is linked to either conscious affirmation of the existing status quo due to the benefits related to it (i.e., the case of the bourgeoisie) or to a desired state of affairs when the exploited classes overcome limitations imposed by common sense and contradictory consciousness and rally for the transformative political action.<sup>145</sup>

### 1.3. Western Radicals

#### 1.3.1. Discourse and Political

Laclau and Mouffe are among the most frequently mentioned authors regarding the contemporary "alternative" conceptualization of hegemony.<sup>146</sup> However, in the case of IR, their presence in the story of hegemony is confined to "technical" articles or deserves only occasional and superficial mentioning.<sup>147</sup> This chapter subsection attempts to close this gap and provide a capsule yet sufficiently comprehensive review of their conceptualization of hegemony, or put better, its position and role within their theoretical universe. Although they are conventionally approached in tandem, they have some slight yet significant differences. For example, while the former was preoccupied with developing the analytical framework of the political discourse theory, the latter was subsequently guided by the

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<sup>138</sup> Ibid.

<sup>139</sup> Gramsci 1971, p.346.

<sup>140</sup> Eula 1986, p.178-183

<sup>141</sup> Santucci 2010, p.139.

<sup>142</sup> Eula 1986, p.178-183.

<sup>143</sup> Ibid.

<sup>144</sup> Bates 1975, p.35.

<sup>145</sup> Ives 2004, pp.108,121.

<sup>146</sup> Van Apeldoorn 2004, Herschinger 2012, Nabers 2019.

<sup>147</sup> Stengel and Nabers, 2019, pp.249-250.

questions of normative character arising from the political discourse theory, namely of how and if at all, a radical and genuinely democratic social organization is possible.<sup>148</sup>

First of all, Laclau and Mouffe, essentially and initially having a Marxist orientation, built a theoretical framework of the political and social revolving around the notion of discourse.<sup>149</sup> Thus, there is no surprise that the term used above was the political discourse theory. However, we must be cautious of the purely linguistic association here since both see discourse in more material terms as embodied in particular social and political institutions, reassuring social formation's stability and relative coherence.<sup>150</sup> In this sense, its material and non-material (linguistic) are not counterposed but considered in their unity and not graspable from outside within this structure. Moreover, it appears to be an essentially unstable and contingent entity: the counter-reference here goes to Saussure and his structural linguistic theory, which stipulated that language is essentially a relational structure of difference, where all of its elements, namely signs, receive their meaning only through the difference about others, thus making themselves deprived of fixed meaning, however, allowing the whole system to be meaningful (meaning is relational, arbitrary, but fixed).<sup>151</sup> The problem with such a view is that it is impossible to explain any linguistic change within such a framework. This problem made Laclau and Mouffe introduce several notions, such as the “field of discursivity” and “empty signifier.”

The former relates to the concept borrowed from Foucault, namely discursive formation (discursive totality), which in its turn is a set of dispersed statements with a particular regularity being present within it.<sup>152</sup> This regularity does not presuppose a structure hidden in the meaning of “statements” but implies a constitution by dispersion and natural frequency of the linguistic statements.<sup>153</sup> The field of discursivity relates to the realm where the discursive formation exists and which it attempts to embrace completely. However, the infinitudinal character of the former cannot achieve this end since, although each object (sign) in this field is discursively conditioned, it is impossible to fix any meaning due to the relational character of the latter.<sup>154</sup> In this sense, each discourse is only partially stable, never wholly set in the field of discursivity, with something always being present outside of the discursive formation, with the latter “outside” allowing for change and, by extension, speaking about power.<sup>155</sup>

To approach this issue, one must keep Laclau’s differential usage of discursive (field) and discourse since the former is always open to change and represents a never-ending assemblage of social differences. In contrast, discourse is a partially successful attempt to connect those differential elements based on some context-specific logic, thus transforming them into a moment.<sup>156</sup> This process of transformation, namely the conversion of elements into moments (particularities, discourses), is referred to by Laclau as articulation. It involves the fixation of the meaning of the individual elements and discursive totality through the connection established among the differential elements.<sup>157</sup> In this way, a discursive moment assumes a particular significance and excludes all other alternatives, thus acquiring a constitutive effect. However, it also makes the latter alternatives (the outside) threaten the fixation of the meaning mentioned above. Therefore, any fixation of meaning resulting from articulation, whether it goes about individual elements or the whole discourse, is only of a temporary and incomplete character due to its

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<sup>148</sup> Hansen and Jensen 2014, pp.251-254; Wenman 2003, pp.581-606.

<sup>149</sup> Breckman 2013, Bertram 1995, Kazharski, 2019.

<sup>150</sup> Jessop 2019.

<sup>151</sup> Jessop 2019.

<sup>152</sup> Foucault 1972, p. 199 cited in Rasinski 2017 p.44.

<sup>153</sup> Rasinski 2011, p.44.

<sup>154</sup> Laclau and Mouffe 1985, p.111.

<sup>155</sup> Rasinski 2017, p.44.

<sup>156</sup> Ibid.

<sup>157</sup> Ibid.

context and relational-specific nature. Yet, this is not the entire story. As mentioned above, Laclau and Mouffe do not limit themselves to the linguistic dimension. They effectively include all meaningful social practices, objects, subjects, etc., into their theoretical framework, so they arrive at a completely different social and political ontology.<sup>158</sup> Within this logic, the conventional difference between the behavioral and linguistic dimensions of the social and political is either incorrect or should be considered under the umbrella of the constitution of meaning within discursive totalities.<sup>159</sup> Thus, whatever has meaning is social and political and pertains to discourse theory as a social and political theory.<sup>160</sup>

The way the field of discursivity is conceptualized, on par with the process of articulation, gives us a hint at the unstable character of meaning; however, it does not shed any light on how exactly this instability of meaning gets along with the meaning construction.<sup>161</sup> In particular, it concerns the issue of how exactly the variety of semi-stable and differential entities become connected, thus creating a chain of relational position, i.e., discourse. That's precisely the role played by the empty signifier, the second important concept in Laclau and Mouffe, namely that of the discursive center, or a nodal point, which acts as a "privileged" element of the discursive formation entitled to linking various differential elements into the latter formation. However, this only becomes possible if a particular signifier is emptied of its meaning since this is the only way to signify the whole discourse.<sup>162</sup> Thus, the discursive power of a specific signifier is directly linked to its emptiness since the latter allows it to articulate various differential elements around it.<sup>163</sup> However, the universality of the nodal point, coming from its essential vacuum, is naturally limited because it derives the former universality only network of linkages concerning other elements of the discursive formation.<sup>164</sup> In this way, paradoxically, with its claim for universality, it signifies an absent universality, a lack of a unifying element at the discourse's core.<sup>165</sup> Hence, the emptiness of the center of the discourse makes the latter possible while at the same time cursing it for permanent incompleteness. Put differently, the empty signifier, as the discursive center, appears to be of a positively non-identifiable content, that acts more as a function of negativity pointing to lack of the former content.<sup>166</sup>

As for now, it might already be possible to see how the aforementioned conceptual framework approaches politics as a realm of human activity. Laclau sees the incompleteness/emptiness of discourses as the primary factor behind the political processes in society since the latter comes to be understood as a struggle to fill the emptiness mentioned above, to complete the discourse, and make it truly universal and positive. Although this task is impossible, political discourses undertake it to end contingency and a society's reconciliation with itself.<sup>167</sup> Thus, antagonisms are introduced as a straw man argument for the impossibility of the latter reconciliation and finalization of the discourse, on par with our acquisition of the positive identity.<sup>168</sup> And with this strive for reconciliation and positive identity comes the notion of "hegemonization," standing for the process by which particular discourses manage to achieve the maximum possible universality.<sup>169</sup> That is when hegemony acquires its primary position in their theoretical framework, namely that of the function of a particularity (demand) acting as a symbol, not just for other various

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<sup>158</sup> Laclau and Mouffe 1985, p.111.

<sup>159</sup> *Ibid.*, p.112.

<sup>160</sup> Rasinski 2011, p.44.

<sup>161</sup> Laclau and Mouffe 1985, p.112.

<sup>162</sup> *Ibid.*

<sup>163</sup> *Ibid.*

<sup>164</sup> Laclau, 1996, p.44.

<sup>165</sup> *Ibid.*

<sup>166</sup> *Ibid.*

<sup>167</sup> *Ibid.*, p.69.

<sup>168</sup> Laclau and Mouffe 1985, p.125

<sup>169</sup> Laclau, 1996, p.69.

particularities, but also the perfect ideal of a society where all demands are fulfilled, that those particularities strive for but are ultimately not able to attain.<sup>170</sup> In case hegemonization is successful, it implies the predominance of a particular worldview or a way of approaching a specific issue as a security issue, not as something else.<sup>171</sup> It usually follows the subversion of the previously dominant discursive order so that the new one might be institutionalized.<sup>172</sup>

However, one crucial point remains: how do some bids for semantic universality turn out to be successful while others are not? That's precisely where the conceptual framework introduced thus far acquires its meaning concerning the political and general societal fabric. In particular, any attempt at hegemonization, i.e., a hegemonic project, involves the presence of three crucial elements, namely the construction of an ideal type of the variety of social demands under the logic of equivalence, the articulation of the antagonism between the inside of the discourse, the social identity of Self, and the outside of the discourse, the threatening Other, and the introduction of an empty signifier which acts as the focal point for unifying the differential demands based on the abovementioned ideal type of the equivalence logic.

The first is essential since any hegemonic project should ensure sufficient societal support to become dominant, and this is only possible if a broad chain of equivalence is constructed among differential demands, with the latter previously being conceived of as not only differential but even contradictory, thus introducing the "axis" of cooperation between the agents of differential demands.<sup>173</sup> This move revolves around the "logic of equivalence," which stresses the commonality of those demands rather than their differential content, with the latter being linked to the "logic of difference" that, in its turn, is the primary threat to any hegemonic project: it is used to construct a counter-hegemonic or defend the old hegemonic project.<sup>174</sup> However, one must keep in mind the point mentioned earlier, namely that any meaning fixation is only partial and never fully stable because moments always preserve some particular meaning, different from the general line of the logic equivalence, hence safeguarding themselves from collapsing into a single demand, and allow for the constitutive workings of the tension between the equivalence and difference logics.<sup>175</sup> In such a way, we come to see that the broader the is the line of equivalence established by the hegemonic project, the more demands are being incorporated, thus increasing the chances of the latter's ascendancy to universality; however, it also contains the seeds of its demise since in this case, it includes more of particular individual meanings that make the latter more open to rearticulation and contestation.<sup>176</sup>

The second element of the hegemonization process, namely the construction of social antagonism, is connected with the last element since the axis of equivalence is a result of the structure of antagonistic limits: introducing the conflictual Self and Other relationship allows to put the whole weight of responsibility on the latter for two crucial issues, namely the lack of fulfillment concerning the equivalent demands and the incompleteness of the equivalent Self, which is the fact due to the very nature of discourse construction mentioned above.<sup>177</sup> In this way, the excluded Other becomes the primary obstacle to fully realizing the promulgated equivalence and associated demands, on par with the role it plays in constructing a particular articulation of the Self, which

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<sup>170</sup> Ibid., 70

<sup>171</sup> Laclau and Mouffe 1985, p.126

<sup>172</sup> Ibid.

<sup>173</sup> Laclau and Mouffe 1985, p.127

<sup>174</sup> Ibid.

<sup>175</sup> Laclau, 1996, p.46

<sup>176</sup> Ibid.

<sup>177</sup> Rasinski 2011, p.45

allows for the foundational opposition to be established.<sup>178</sup> Thus, we arrive at a situation when the discursive space becomes divided between opposing semantic camps.

The third element of a successful hegemonization pertains to embracing with the help of particularity the universal signification, namely that a particular demand out of the entire equivalence totality assumes the role of representing all other demands on par with the symbolic representation of the society's fullness and completeness. This is achieved with the help of the empty signifier (master signifier), the concept described earlier in this subsection, which acts as the "nodal point" and serves as a semantic horizon for the subjects.<sup>179</sup> In this way, the master signifier becomes "a surface for the inscription," allowing many individuals to link their demands to itself as the largest common denominator.<sup>180</sup> Moreover, the empty signifier becomes the name of the discursive formation, thus allowing it to appear as a unified object with the essential claim standing behind it that if only the universal demand it stands for is realized, then the antagonistic Other would be eliminated, and by extension the true and total unity of a societal identity attained.<sup>181</sup>

Moreover, there are a couple of additional factors or characteristics of a successful hegemonic project, namely its discontinuity and conformity. The former concerns its promise to break with the old structures of meaning, to overcome its unjust character and known weaknesses. However, this promise is empty and futile since it is mainly linked to its idealized universalistic element (perfect society ideal) rather than any practical consideration.<sup>182</sup> The latter, consequently, is about the necessary degree of fit between the new structures of meaning put forward during the hegemonization process and the already present semi-stable discursive practices, something that is close to the Gramscian notion of "common sense," namely those practices that go so deep into the matter of the social, that it is hardly possible to identify its discourse belonging and alternatives are not conceivable.<sup>183</sup>

### 1.3.2. World System(s) and Capitalism

In this subsection, we turn to the World System Theory, also known as the world system analysis, and its usage of hegemony. It is essential not only because of its proximity to Gramsci and the general post-Marxist view of the social and political reality but also because its formulations of hegemony are pretty close and naturally "digested" by the students of IR compared to post-structuralist and post-colonial perspectives on the social, and by extension, the international.<sup>184</sup> Put differently, WST is one of the radical or non-mainstream approaches which was successfully "normalized" within the discipline of International Relations, although it does not entirely belong to its disciplinary realm.<sup>185</sup>

The WST is generally considered a multidisciplinary approach to global social history, with an analytical priority given to the world system rather than separate social formations (societies/states) as the primary unit of analysis. The notion of "world system" usually serves to refer to a system of inter-regional and transnational division of labor, dividing the world into three types of countries/regions, namely core, semi-periphery, and periphery, with the former being focused on high-skill and capital-intensive industry, the latter reserved with the labor-intensive and extractive industries, while the second

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<sup>178</sup> Ibid.

<sup>179</sup> Laclau and Mouffe 1985, p.128

<sup>180</sup> Ibid.

<sup>181</sup> Rasinski 2011, p.46

<sup>182</sup> Ibid.

<sup>183</sup> Ibid.

<sup>184</sup> Wallerstein 2004, p.23

<sup>185</sup> Spindler 2013, pp.176-178.

combines, in different proportions and various patterns, the features of the previous two.<sup>186</sup> This pattern of the labor division maintains and reinforces the predominance of the core region/countries. However, the world system has its internal structural dynamics mainly arising from the changes in technology and infrastructure, thus allowing for occasional shifts and “reshuffling” of the respective systemic “membership.”<sup>187</sup> As already mentioned, the underlying principle providing systemic unity is the division of labor, thus making the world system closely associated with the world economy, which is embedded in the capitalist economy.<sup>188</sup>

Although various scholars have contributed to establishing WST as an essential research program within the social sciences, it is strongly associated with the version developed by Immanuel Wallerstein.<sup>189</sup> Wallerstein, in his turn, gave various definitions of the world system. On one occasion, he referred to it as a unit based on a single division of labor yet characterized by several cultural systems.<sup>190</sup> On another, Wallerstein spoke more of the social system, its rules, boundaries, structures, inner conflicts, and tensions as the source of the former’s stability on par with making an analogy with a biological organism and its lifespan.<sup>191</sup> Later, he came up with one of the best known and conceptually broad definitions, namely that of “a system that is a world,” but which does not contain the whole world spatially and within which we operate as social beings constrain us with its rules.<sup>192</sup> These systems are of only two types, namely world economies, and world empires, and opposed to those currently non-existent mini-systems: the second refers to large bureaucratic structures with a sole center of power and culture, and a corresponding axial division of labor, while the former is a large-scale division of labor with various political and cultural centers. The peculiarity of the modern world system is that it has expanded geographically to such an extent that now it covers the whole world.<sup>193</sup>

Specifically, Wallerstein refers to the world system as a set of mechanisms acting as a medium for surplus value redistribution from the periphery to the core. The market is a primary one among those mechanisms. The definition of the former two is pretty close to the one mentioned above and is essentially used as a euphemism for developed and underdeveloped countries. In addition, he speaks of the temporal features of the world system, namely its cyclical rhythms related to the short-term economic fluctuations and secular trends related to the more profound long-term dynamics, for example, overall economic growth.<sup>194</sup> The two other notions linked to the temporal dynamics of the world system are contradiction and crisis. The former refers to the conflict between the long-term and short-term trends, while the crisis relates to a situation when the contradiction is framed within such a context that it ends the system’s existence.<sup>195</sup>

As already said, the modern world system is essentially a world economy with many political and cultural centers linked to each other and tied together as an interstate system.<sup>196</sup> Put differently, the interstate system is a sub-system of relations between the states of the core, semi-periphery, and periphery, which was born out of the development of the capitalist world system during the long XVI century, with central elements of this subsystem being the idea of state’s sovereignty and interstate agreements and rule of behavior, however, the former idea does not bear the utmost importance in the logic of the

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<sup>186</sup> Barfield 1998, pp.498-499.

<sup>187</sup> Wallerstein 2004, pp.23-24.

<sup>188</sup> Wallerstein 1974, p.390.

<sup>189</sup> Alvin 1990, p.169-190.

<sup>190</sup> Wallerstein 1976, p.347-357.

<sup>191</sup> Wallerstein 2004, p.29.

<sup>192</sup> Wallerstein 1976, p.347

<sup>193</sup> Ibid.

<sup>194</sup> Wallerstein 2004, pp.23-30.

<sup>195</sup> Ibid.

<sup>196</sup> Wallerstein 1984, pp.30-31.



system, thus making it a place where everyone is “neither sovereign nor equal.”<sup>197</sup> There are also no specific definition rules concerning the state in Wallerstein; no specific social group/class is entitled to “dominating” the state; instead, there are various internal, external, and transnational groups seeking control of or opposing the power of a state.<sup>198</sup>

In this framework, hegemony occupies a peculiar place, being defined in terms similar to those found in the mainstream of IR. However, the basis of it is highly dependent on various economic factors, with the latter issue making Wallerstein face accusations of extreme economism from his fellows WST colleagues.<sup>199</sup> First, hegemony is always about the world economy since it is found only in the interstate system produced by the latter. In many instances, it is the opposite of the thrust of the world empire.<sup>200</sup> When speaking of the actual content of hegemony, Wallerstein does not go much away from definitions found in the then conventional wisdom of IR, namely the situation when the permanent rivalry between the Great Powers is so unbalanced in favor of one of the latter powers, that it might factually dictate its wishes along various dimensions, including economic, political and even cultural.<sup>201</sup> The primary sources of such a disparity Wallerstein locates in the ability of the enterprises located in the hegemonic state to operate more efficiently along the three economic arenas, namely agriculture, commerce, and finance; moreover, the disparity is such that those enterprises occupy a higher share of the market not only internationally, but also within the domestic markets of other states.<sup>202</sup> Moreover, this economic edge is complemented by other factors such as the most significant military or the control over international institutions; however, it does not imply the omnipotence of a hegemon since the latter essentially does not exist within the international system.<sup>203</sup> In this sense, similarly to many others, he defines hegemony as a sector of a continuum characterizing the permanent struggle among the states within the international system, which cannot be understood as a state of being – at one end of the continuum is the ideal balance between states, at the other one is hegemony, and both are rare and unstable instance within the international.<sup>204</sup>

However, according to Wallerstein, hegemony is not a mere instance of power balance dynamics within the interstate system. Instead, it is a peculiar phenomenon arising in specific circumstances and affecting the long-term development dynamics of the capitalist world economy.<sup>205</sup> The specificity of hegemony concerns four issues, referred to by him as analogies. The first refers to the advantage, or “edge” in Wallerstein’s words, achieved by the enterprises domiciled in the hegemonic country within the three economic domains: although the ascendance to hegemony follows a sequential acquisition of advantage in agriculture, commerce, and finance, the hegemony itself stands for the short moment when there is a simultaneous advantage in all of the three domains.<sup>206</sup> The second pertains to the dominance of the liberal ideology in both economic and political terms. However, not taken too far with permanent and obvious deviations always present, either domestically or internationally, economically or politically.<sup>207</sup> The third, in its turn, is about the kind of military power and dynamics of military conflict within the interstate system: although a hegemon ends up with considerable naval and air military potential, all of them followed the pass of discussing the necessity for a large army to be ultimately in need of

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<sup>197</sup> *Ibid.*, p.33-34.

<sup>198</sup> Wallerstein 1984, pp.33-34.

<sup>199</sup> *Ibid.*

<sup>200</sup> Wallerstein 1983, p.101.

<sup>201</sup> *Ibid.*

<sup>202</sup> *Ibid.*

<sup>203</sup> *Ibid.*, pp.101-102.

<sup>204</sup> Wallerstein 1983, p.102.

<sup>205</sup> *Ibid.*

<sup>206</sup> *Ibid.*

<sup>207</sup> *Ibid.*, p.103.

building up the latter; moreover, in each of the historical cases hegemony was secured by a long and large-scale world war, primarily understood as a land-based war involving all of the major powers and inflicting heavy damage on “land” and population.<sup>208</sup> Finally, the fourth concerns the precise relation between the ascendance to hegemonic position, the world wars, and, as Rondo Cameron puts it, price “logistics”: here it goes about the peculiarity of the pattern of conflict within the international system – while small wars are an ordinary reality of the interstate system, large scale conflicts are rare, and always linked to the patterns of secular inflation and deflation.<sup>209</sup>

In this way, Wallerstein was curious about what is so particular about a capitalist world economy that gives rise to such tendencies. The answer he provides is that the hegemonic dynamics are merely an aspect of the primary role played by the political apparatus in capitalist production.<sup>210</sup> Following suit, he argues that capitalism is defined only by the partially free flow of factors of production and the selective political interference into the market, which is against the conventional narrative about capitalism, namely the free flow of factors of production and the absence of state interference into the economic matters.<sup>211</sup> Since the primary principle defining the capitalist mode of production is capital accumulation, the latter interference usually takes place to advance this process and favors one group of “accumulators” over another – according to Wallerstein, these two assumptions define the whole nature of hegemonic politics.<sup>212</sup>

Giovanni Arrighi is a recent example of WST’s appropriation of the Gramscian vocabulary and underlying understanding of hegemony. Representing a more recent strand of WST, he attempted to build a splendid theoretical edifice ranging from the IPE analysis to the historical sociology to explain the mutual dynamics and dependence of the capitalist and interstate systems and to look beyond the crisis of the US predominance. He was among the first to apply the Gramscian hegemony to the international realm and put the latter at the center of his theoretical elaboration of capitalist dynamics.<sup>213</sup> The originality of Arrighi’s input into the WST comes from his dissatisfaction with how hegemony was conceptualized by Wallerstein and neo-realism as linked to dominance and power distribution conceived of within the logic of international orders.<sup>214</sup> Instead, he approached hegemony as a power to govern the international system, which must involve a transformative ability on the side of a hegemon.<sup>215</sup> In its turn, it presupposes a notion of power that departs from a direct association with dominance and acquires the Gramscian flavor, namely that of “intellectual and moral leadership.”<sup>216</sup> Thus, we speak of the consensual element of power having analytical primacy and constituting the foundation of the international order while located within the dominant economic groups of the latter and associated with their ability to set the universal ideational plane for the conflicts arising.<sup>217</sup> In this sense, hegemony describes a situation when the hegemon consensually draws others into its development, while dominance is when the former does the same against the will of others.<sup>218</sup>

Another part of the Gramscian flavor within the framework of Arrighi, and linked to the abovementioned issue of universal plain, concerns the formulation of the general interest the hegemon attempts to advance. In opposition to Wallerstein and neo-realists, the

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<sup>208</sup> Wallerstein 1983, p.103

<sup>209</sup> *Ibid.*, p.104.

<sup>210</sup> *Ibid.*, p.104.

<sup>211</sup> *Ibid.*

<sup>212</sup> *Ibid.*

<sup>213</sup> Arrighi 2010; Diodato 2018, pp.668-673; Fusaro 2018, pp.36-40; 2019, p.362

<sup>214</sup> Arrighi 1990, p.366.

<sup>215</sup> Arrighi 1993, p.148.

<sup>216</sup> *Ibid.*, p.149.

<sup>217</sup> *Ibid.*

<sup>218</sup> *Ibid.*, p. 150.

latter does not affect the absolute or relative gains each state gains from the propagated order but rather pertains to the enlargement and solidification of the system as a whole. However, here it goes not about the international system so much, which is only a backdrop or a surface of the actual socio-historical dynamics, but the system of relations between the dominant and dominated social groups – otherwise put, the successful hegemonic order aims at increasing the power of the rulers over the ruled.<sup>219</sup> In this sense, the universality of the plan unfolds as the internalization of the order by its subjects, whatever the actual benefits it implies, and acceptance by the ruling groups across the international system is thought of in its societal underpinnings.<sup>220</sup>

Moreover, Arrighi brings together the international and socio-economic dimensions while speaking of hegemony. In particular, it becomes evident when he speaks of the two logics of power and their interrelation in defining the stability of hegemony.<sup>221</sup> The first is the territorial logic of power, and might be associated with what we conventionally refer to as the international realm – it unfolds as the permanent strive for the expansion and stabilization of a polity in geographic, demographic, and economic terms. The second is the capitalist logic of power, which focuses on endless capital accumulation through economic exploitation. The two are in a permanent conflictual and interdependent relationship, with the outcome of this conflict being the actual structure and dynamics of the international order.<sup>222</sup> From this point of view, the “ruling” social group appears to be composed of two sub-groups, namely the economic and political elites, associated with the two logics of power. Thus, the hegemonic project must satisfy not only the majority of the “ruled” within the social formations of the international system but also find an acceptable balance between the interests of the former two.<sup>223</sup> However, from here, Arrighi arrives at a peculiar and paradoxical explanation of the hegemonic dynamics. Each hegemonic project aims to fulfill the demands of the ruling political and economic elites and introduce a beneficial balance between the two, increasing their respective societal and political power and bringing in more systemic differentiation between the two, in both terms, spatial and function.<sup>224</sup> This is the source of a future destabilization of the hegemonic order: the aforementioned functional differentiation and spatial expansion, on par with the increase in the absolute power of the respective groups, leads to a situation when the hegemon is no more capable of mediating the conflict between the latter groups.<sup>225</sup>

Historically, concerning the hegemonic dynamics, Arrighi chose the Venetian republic as the first entity to establish a prototype of the hegemonic project described above. However, unsuccessfully, precisely because of a complete lack of attention towards the territorial expansion's political dimension, focusing instead only on the capitalist logic of power.<sup>226</sup> The second case he brings in, and the one which he refers to as one of the three real hegemonies of capitalism, is the case of the United Provinces of Holland. According to Arrighi, one might observe a successful bid for hegemony along with the two logics of power, the territorial and economic. The first is evident in the role the Dutch played in the political dispute resolution at that time and the establishment and maintenance of the Westphalian system of interstate relations, while the second, the economic one, consists in acting as a role model for the commercial and financial classes in Europe. In this way, the Provinces could satisfy the interests of the then-ruling elites along the two logics.<sup>227</sup> The

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<sup>219</sup> Montalbano 2021, pp.83-84.

<sup>220</sup> *Ibid.*, pp.85-86.

<sup>221</sup> *Ibid.*, pp.86-87.

<sup>222</sup> *Ibid.*, pp.87-88.

<sup>223</sup> Arrighi 1993, p.154.

<sup>224</sup> *Ibid.*

<sup>225</sup> *Ibid.*

<sup>226</sup> *Ibid.*, p.165.

<sup>227</sup> Arrighi 1993, pp.161-165.

subsequent case brought by Arrighi concerns the British hegemony, which was different from the Dutch regarding its global scale. He saw one of the elements of the successful British hegemony as linked to its complex system of the ruling elites' interests articulation, representation, and mediation which comprised part of its "general interest" promulgated internationally. On top of this, it was complemented by the promise of increasing the wealth of subjugated nations, although at the expense of their sovereignty.<sup>228</sup> The last, and the closest to his ideal type of hegemony, is the post-War American hegemony, with its primary difference being that it was aimed at promulgating the general interest in terms of an efficient mediation along the two axes of power, namely the political interests of the leading state itself, its allies and subordinated states, on par with the conflicts between the dominant and subordinated economic groups across the core and periphery of the world economy.<sup>229</sup> Although the logic of operation of the American hegemony remained the same as in the case of the British predecessor, it simply pushed it further on – namely, if, in the British case, it was about expanding the international system under the banner of liberal ideology, namely the elevation of the pursuit of wealth over all other political concerns, the American case finalized the expansion of the system with the motto of the mass consumption being dominant over all other matters.<sup>230</sup> In this sense, we can see the hegemonic dynamics revolving around the enlargement of the social base it refers to – the mediation of the conflict happens not through the resolution of the tension stemming from the exploitative relations but rather concerns the inclusion of broader masses into the framework of "well-being," and transnationalization and politicization of the economic dimension of the international system.<sup>231</sup>

Arrighi better explains the two issues in his subsequent works. In particular, what concerns the former, Arrighi slightly reformulated his approach. Now it was not so much about the hegemonic state but somewhat hegemonic blocks of the economic elites merging with the governmental institutions to reassure the minimum level of conflict within the international system.<sup>232</sup> In this case, the last five hundred years of human history were not much about interstate competition with the backdrop of capitalist expansion, but rather the latter competition being played out within the context of the overall increase of the capitalist class power.<sup>233</sup> The latter issue pointed more to the interplay of capitalist expansion and social upheavals resulting from the latter, thus necessitating a broader inclusion into the framework of wealth distribution of the subjugated groups.<sup>234</sup> Otherwise, any economic expansion associated with a particular hegemonic order implies international conflict and social upheaval with a subsequent necessary redefinition of the hegemonic block to enlarge its membership.<sup>235</sup> However, with the US hegemony, this logic reversed, the social pressure was the primary reason for the redefinition of the hegemonic agenda and enlargement of the hegemonic block to include a wider "laymen audience."<sup>236</sup> In this sense, Arrighi gives more theoretical weight to the social aspect of the contemporary hegemonic dynamics rather than his previous emphasis only on the logic of territoriality and economic expansion.

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<sup>228</sup> Ibid., pp. 173-174.

<sup>229</sup> Arrighi 1982, p.56.

<sup>230</sup> Arrighi 1993, p.180.

<sup>231</sup> Ibid.

<sup>232</sup> Arrighi 2010, pp.10,123.

<sup>233</sup> Ibid., p. 13.

<sup>234</sup> Arrighi and Silver 1999, p.282.

<sup>235</sup> Ibid., pp. 283-284.

<sup>236</sup> Ibid., p. 289.

## In conclusion

This chapter has its primary task as unpacking the meaning of hegemony outside of the IR box and beyond the mere conventional “consent thesis” had effectively demonstrated that starting with the Russian revolutionaries, hegemony, as a notion about the exercise of a degree of influence over others, clearly exceeds the mere dichotomy of consent and coercion. It is not only that hegemony can be thought of as a phenomenon linked to the domestic societal dynamics or those of the international realm but also as a strategy, a program, a specific disposition of capabilities, context, and goals. The strive for hegemony stems not from one’s predominance in material or ideational power but originates in one’s intentions, plans, and aspirations. Yet it does not lose its material embeddedness since the same material context significantly shapes those intentional elements of hegemony.

In this sense, the Bolsheviks and Mensheviks debate taught us that hegemony can be thought of as a degree of prestige and independence leading to wide societal recognition – although a societal one, still originating in one’s autonomy and subsequently projected on the whole political landscape of a society. In this sense, hegemony is a societal projection of one’s realization of her historical position and importance. While this pertains more to the Menshevik’s view of hegemony, Bolsheviks give as an additional “portion” of hegemonic “wisdom” – being more preoccupied with the organized political struggle, they relocate hegemony from the realm of individual autonomy to the one of society-wide pursuance of power. In particular, Lenin was the one to popularize the idea of a less powerful but energetic minority aiming for political power located within the state. The latter is achieved not only through situational alliances and leadership in the emancipatory struggle but also through the conscious understanding of the societal process and overall direction of the historical development. Moreover, for the first time, we face various agential and institution-like mechanisms associated with hegemony, be the latter a party tribune or the political leaflet. All of those serve one purpose: projecting one’s political aspirations and the vision of the future social order.

Antonio Gramsci, in his turn, might be conceived as the one who universalized hegemony, depriving it of the strategical or attributive flavor and moving it more to the realm of a mechanism, type of power, or even a type of order. First, he shifts away from the attributive treatment of hegemony when the latter is associated with a particular group, class, or agent. Instead, it becomes even and peculiarly “spread” over various parts of society, never fully fixed anywhere. Although it is mainly associated with free association, it is impossible without a degree of “monopolized violence.” Moreover, instead of coercion or persuasion, based on the objective disposition of force, or socioeconomic circumstances, it becomes associated with consent based on the “preclusion” of one’s ability to comprehend the social reality around herself. This consent does not stem from deception or trickery; it is instead a situation of speaking about the cold while living in a sub-tropical climate – it stems from the limitations inherent in the way people think and act, and it is natural to the extent it is not. Second, in this reading, hegemony is spread between various “parts” of society and elevated to the level exceeding each of those it belongs to. In this sense, it is an emergent reality coming from the interaction of various actors and societal factors across different levels of socio-political reality.

Subsequently, these ideas of Gramsci were either relatively simplified and transferred to the realm of the international and seriously “materialized” by the representatives of WST or made highly complex and barely accessible to an ordinary reader by those working within the post-structuralist tradition. However, the two still served excellent service to the “hegemonic problematique.” The former, “internationalized hegemony,” and inserted into the framework of global economic development and inequality, pointing to the specifics of the economic organization of international life,

which serve as the basis of the seemingly natural and self-evident order. Moreover, the former shifted the typical source of hegemony from the state to one of the social groups that interact within the transnational dimension, making hegemony a transnational phenomenon guided not by the logic of material power accumulation but the twofold one of capitalist accumulation and territorial expansion. This twofold character of the underlying logic of the latter provides a rationale for explaining the dynamics of hegemony and its consensual element due to the struggle between the two.

Laclau and Mouffe, in their turn, elevated the linguistic element of hegemony, already present in Gramsci and quite often overlooked, to the level which deserves praise and respect. In particular, they showed how hegemony, as a fundamental organizing principle of social and political life, is not about making us express consent concerning something specific but rather how much it is about the actual absence of anything to agree on. In other words, hegemony is about meaning production, a kind of discursive power, but not the one associated with particular meanings. Instead, it tries to ally as many various “meanings” as possible around itself. However, this “allying” is not of a positive kind, i.e., based on constructing an all-embracing substantial discursive framework. Instead, it is based on masking the difference under the banner of unity and opposition to the assumed discursive opponent, which represents not only the semantic opposite of the proclaimed “banner” of an agreement but the very reason the latter is lagging behind its ideal of social order.

Although tremendously limited in scope and lacking the specificity of focus, this chapter was nevertheless able to demonstrate that hegemony, apart from several specific instances, was never only about the material vs. ideational or coercive and consensual factors. Those mentioned are, in the best-case dimensions of hegemony, the collateral conceptual damage one experiences while approaching the hegemonic problematique. Moreover, the same division of the elements of hegemony into this kind of dichotomic oppositional couple looks like an attempt to establish a series of Laclauian empty signifiers, which serve the purpose of “uniting” our perception and thinking about hegemony in a way that suits the overall disciplinary and political agenda of those who proclaim them. Hence, we move on to the part on hegemony within the corpus of IR theory, with the hope that it would be possible to demonstrate that even if limited by the dichotomic couples, we still should go beyond the mere consent and coercion thinking since there is something more than this concerning “hegemonic problematique.”

## Chapter 2. Hegemony and IR Theory

### Introduction

Finding the discipline's most misunderstood and misused concept is an old and commended hobby among IR scholars.<sup>237</sup> Depending on one's theoretical orientation, graduate-level training, or personal preferences, we can speak of power, structure, security, interests, norms, or identities as fuzzy concepts populating the disciplinary terrain and making generations of IR students go through the ups and downs of "Aha! Moments" about each of them.<sup>238</sup> One can spend hours at the library with wall-like piles of books to create a simple semantic map of a concept like "security" or "interest" inside her mind, with the outcome being always the same – it is enough to pass by one short article by an author never encountered before, just to be led to another dozen of "dead white men" who were quite productive throughout their lifetime. Yet this is more of a disciplinary layman's perspective since, luckily, there is a significant number of prominent scholars within the field who managed to elevate themselves above this routine of intellectual anarchy, either by high-class training, aptitude, hard work, or more often, all of them taken together.

Thanks to these scholars, the disciplinary "public" can get a readable and understandable review of who, when, what, and why had written on one or another issue about the topic under consideration. It is them who decide what and who constitutes any theoretical debate and what is a "sketch" picture of the latter. Arguing against such a state of affairs is unreasonable and unrealistic – it is impossible to imagine every IR student familiarizing herself with the whole intellectual canon in every thematic realm of the discipline.<sup>239</sup> Moreover, the same applies to more narrow thematic domains linked to specific subfields within IR – ultimately, the conceptual and theoretical work is not for everyone, and not everyone needs it.<sup>240</sup> There are hundreds of IR scholars with their boots on the political ground and their hands on essential data; theoretical concepts are fundamental and valuable beacons in their collective quest for the "essence" of international politics, yet they are no more than this. The role of a flashlight is played by other mediums ranging from their graduate studies supervisor and method to career prospects and personal intuition.<sup>241</sup>

However, why should this be important for this work in the first place? The answer belongs to this myriad of academic banalities one encounters in almost every paper on conceptual issues within the field – namely that those general overviews are limited in various respects and obscure argumentative specifics and auxiliary conceptual apparatus linked to a particular issue debate. For those who take part in those debates on the pages of *International Organizations*, omittance and refocusing of narration is an important and even necessary tool for any discussion to proceed: unspoken references and hints to the underlying theoretical context are an essential part of the high-class scholarship since, ultimately, the disciplinary public is free to contemplate the debates taking place in the ivory-tower(s) of IR, however, no one expects the former to take part in the latter.<sup>242</sup> Yet, the problem arises when this kind of scholarship is used by the other part of the discipline, which is more "proletarian" due to its thematic focus, geographical/institutional location, or scholarly quality. In this case, the simplicity of conceptual reviews, which serves the mere aim of "saving" time and space for more critical issues to be discussed, is taken at its

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<sup>237</sup> Cleveland 2015, Schroeder 1997, Kratochwil 1982, Tang 2009, Davenport 2011.

<sup>238</sup> Hendrix et al. 2020, Leggold & Nincic 2002, Tatum 2020.

<sup>239</sup> Kacowicz & Mitrani 2016, Haack 2010, Kavalski 2007.

<sup>240</sup> Leggold 1998, Lamy 2022, Buzan 2018.

<sup>241</sup> Nincic & Leggold, 2000, Tanter 1972, Sus & Hadeed, 2020.

<sup>242</sup> Ish-Shalom 2006, Turner & Nymalm, 2019, Tyler 2012.

face value. This simplification is then retranslated across the discipline with the support of prestige referencing, thus producing a non-existent image of a clear-cut and comprehensive theoretical landscape.

Nonetheless, if it were only about the simplified picture of IR's conceptual landscape being disseminated among the "populace" of the discipline, it would only be half the trouble – the real danger stemming from this natural "division of labor" is when the "rest" of the discipline starts using those debates as the source of conceptual inspiration for its thematic and research purposes - building a smooth conceptual framework for one's empirical research always requires reference to high theory writings.<sup>243</sup> The problem is that the higher the level of simplification is, the more space for conceptual and empirical "maneuver" available to those who abuse the latter by hiding behind prestige referencing. That is precisely the case with hegemony and IR scholarship. To say that there is conceptual disarray in IR concerning hegemony is to exaggerate tremendously, yet to say that everything is crystal clear is another exaggeration. A better perspective appears to be as follows: the elite scholarship is divided into several coherent and mutually connected camps that acknowledge, at least partially and situationally, each other's claims concerning hegemony (starting with the very semantics of the term and going to the specific mechanics of the phenomena), while the more "vulgar" or "popular" literature on hegemony, tends to take the divisions mentioned above at face value, and avoids considering specifics of every perspective on hegemony.<sup>244</sup> That leads the latter to the abovementioned situation of explicit oversimplification and the creation of substantial non-existent divides, which tend to produce misleading conclusions when operationalized in empirical studies through prestige referencing.

Thus, what follows is an attempt to address the abovementioned issues related to hegemony, its usage within the discipline, and the auxiliary conceptual apparatus associated with the former. Yet, this task is achieved in a peculiar and even risky way. In particular, what follows is not an attempt to create an all-embracing and detailed map of the term's usage within the discipline. It is neither an attempt to critically analyze its usage, propose alternatives or introduce a theoretical reform of the "hegemonic problematic." It is not a textbook chapter on hegemony and barely qualifies as a reliable reference to the abovementioned corpus of works. Instead, it is a *via media* between the superficial reading of the term's usage and the overly theory-loaded and domain-specific one. The former rarely goes beyond the conventional material and coercive vs. non-material and consensual opposition. At the same time, the latter is hardly readable for someone from the "lower" classes of the discipline, either due to the heavy context semantics or a large number of additional terms and theoretical arguments.

The outcome of this attempt to create a *via media* is quite peculiar in another respect – being less an example of rigorous scholarship, it should be treated more as a case in disciplinary anthropology. In particular, instead of hiding behind canonical literature reviews and artificially "boosting" the structural coherence of the text, it presents all of the incoherence of perception, comprehension, and writing a non-native speaking student of IR, might encounter while approaching hegemony *problematique* in the discipline. In other words, this is the story of roaming in the darkness and bumping into the walls of intellectual dead ends, with every bump carefully registered in the following pages. Thus, one should not be surprised by the heavy referencing followed by a sudden drowning in one conception and author, with this cycle evident throughout the work. Moreover, the lack of narrational structure and substantial focus, on par with an extensive review of works under consideration, must be considered a natural part of this kind of scholarly endeavor.

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<sup>243</sup> Buzan 2018, Caprioli 2004, Elman & Elman 2002, Collins Stockton 2018.

<sup>244</sup> Antoniadis 2018, Clark 2011, Schmidt 2018, Ikenberry 2019, Hopf 2013, Allan 2018.



The remaining part of this introduction is a short review of the three conceptual analyses of hegemony in the IR theoretical mainstream. The second represents the capsule analysis for the general public mentioned above, with some of the additional terms and assumptions covered, however, to quite a limited extent; the third pertains to an overly specialized and theoretical context laden, which allows for another type of simplification, stemming from a mere fact of misunderstanding, and inability to grasp all of the issue specific problematique; finally, the first one presents, a readable and easily accessible review of general usage of hegemony across the IR's theoretical traditions, however, it suffers from excessive overgeneralization since it serves as an introduction to the author's proposed reformulation of the term's substantial content. As one would observe, this subchapter, in many respects, is guided by the narration structure of these state-of-the-art reviews, either in terms of elaborating on those theoretical and conceptual aspects omitted or providing a more detailed picture of the issues presented as non-problematic and characterized by a sheer disciplinary convention.

### Hegemony in the IR cage<sup>245</sup>

The first comprehensive review of hegemony and its usage within the IR literature considered in this subsection comes from Andreas Antoniadis and his attempt to draw a new direction for the whole hegemonic problematique within the discipline.<sup>246</sup> He notes that the problematique associated with hegemony goes across the traditional divisions concerning the levels and units of analysis and generally pertains to the situation of a high capability for coercion and influence or control concerning the structure and units of the international system; however, it is not extended to the cases of direct and formal control.<sup>247</sup> In this formulation, hegemony excludes colonization, annexation, and occupation.<sup>248</sup>

Antoniadis defines four approaches to hegemony in the discipline of International Relations: conventional, neoliberal, Gramscian, and radical. The first refers to a condition of extreme power concentration in one of the international system's actors/units/states, thus making the latter possess a preponderance of power that allows the exercise of leadership in and dominance over the system.<sup>249</sup> The latter two notions usually assume the ability to control the structures and behavior of the system's units, with the foundation of the last control resting on various factors, from the geographic position and economic position to the quality of domestic government and technological potential.<sup>250</sup> The second, the neoliberal one, is essentially a critique of the realist version of the hegemonic stability theory, which stipulates a necessity for a dominant power to exist in an open, liberal world economy.<sup>251</sup> This critique revolved around the assumption that it is not the power concentration that is solely responsible for international stability but rather international regimes emanating from the latter – in this sense, we shift from the subject of hegemony as a necessary condition for the stability of the international order, to the structures and mechanisms of the latter as having an independent role in the maintenance of this stability.<sup>252</sup>

The third approach to hegemony in IR, and by extension, the second kind of critique of the neo-realist version of HST, comes from the neo-Gramscianism in IR. The

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<sup>245</sup> The title of this subsection is taken from the first review of the term's usage in IR, namely Antoniadis 2018, and corresponds to a respective subsection within his paper,

<sup>246</sup> <https://core.ac.uk/download/pdf/2709786.pdf>

<sup>247</sup> Antoniadis 2018, p.2

<sup>248</sup> Doyle 1986; Ferguson 2004; Rapkin, 2005 cited in Antoniadis 2018, p.2

<sup>249</sup> Antoniadis 2018, p.3; Gilpin 1981 cited in Antoniadis 2018, p.3

<sup>250</sup> Doyle 1986, Ch.1; Morgenthau 1965, Ikenberry and Kupchan 1990, pp.287-288 cited in Antoniadis 2018, p.3

<sup>251</sup> Antoniadis 2018, p.4; Kindleberger 1973, Ch. 14; Krasner, 1976; Gilpin, 1987, pp.72-80, 85-92 cited in Antoniadis 2018, p.3

<sup>252</sup> *Ibid.*; Krasner 1983; Keohane 1984 cited in Antoniadis 2018, p.4

latter, based on the IR rereading of Gramsci, stipulates that hegemony, understood as a specific form of domination in the international realm, pertains to the process of universalization of norms and values associated with the hegemon; moreover, the latter not only might be but rather should be understood in (trans-)-national terms, rather than in state-centric terms.<sup>253</sup> Hegemony, according to Antoniades' reading, is not only based on consent but also acts as a social order that embraces various levels and units across the social fabric of domestic and international orders and is glued together by the presence of the universally shared and controlled by the dominant actor "common sense."<sup>254</sup> The last approach to hegemony, according to Antoniades, is the radical one. Those writing within this approach are thought by him to be united by the standard reference to Michel Foucault and departure from the mainstream way of "dealing" with hegemony.<sup>255</sup> For example, Laclau, in his reading, speaks of hegemony as the "moment that a specific particularity/project acquires a universal signification"; moreover, it is thought of as a set of social practices that are independent of the social forces that gave birth to it, and are always in neutralizing tension with counter-hegemonic projects and social forces.<sup>256</sup> Others within this strand found their inspiration in the notion of biopolitics and conceive of hegemony as a decentralized and deterritorializing rule that regulates social life, in their terminology, 'social bios', thus transferring the very locus of control on the level of the individual life.<sup>257</sup>

Antoniades sees this typology as reflecting the current state of affairs and the natural limitations in analyzing hegemony in IR. Moreover, the former stems from the latter's very nature, namely its theoretical divisions concerning the level and unit of analysis, ontological assumptions about the international, and even the methodology used.<sup>258</sup> As a solution to the limitations mentioned above, he proposes to refocus the study of hegemonic problematique from the theoretical dividing lines characteristic of IR so that while speaking of the former, he moves to the very nature and operations of hegemony as a socio-political phenomenon.<sup>259</sup> In particular, he proposes a three-dimensional matrix for thinking about hegemony, including the subject of hegemony, its conditions of existence and reproduction, and the nature of power movement within the former.<sup>260</sup> The first is linked to the hegemonic agents, namely those who "bear" hegemony, while the second pertains to the foundations and primary maintenance sources of hegemony, namely material and ideational factors; finally, the third is associated with the origins and directions of the hegemonic power from and within the order of domination, i.e., whether it is external concerning the hegemon or an essential part of it, and whether it proceeds bottom-up or top-down.<sup>261</sup>

Ian Clark, in his turn, links the full review to the context of his theoretical preoccupation, namely the forms and roots of legitimacy in international politics.<sup>262</sup> He avoids any references to the Ancient Greek tradition in his review of the state of the literature on hegemony in IR; however, he turns to a conventional observation that the very term "hegemony" lacks a clear and commonly accepted definition, with the two primary semantic pools revolving around domination and leadership – even though the two are essentially opposed conceptualizations of the term, and give rise to two different

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<sup>253</sup> Antoniades 2018, p.5; Gramsci 1971, p.366,166 cited in Antoniades 2018, p.5

<sup>254</sup> Ibid.; Cox 1993, pp. 52, 61-62; Gill 1993a, pp. 41-42, cited in Antoniades 2018, p.5

<sup>255</sup> Ibid., p.6; Laclau and Mouffe, 1985; Hardt and Negri, 2000 cited in Antoniades 2018, p.6

<sup>256</sup> Ibid., p.6; Laclau 2000, 1996; Foucault 1972 cited in Antoniades 2018, p.6

<sup>257</sup> Ibid., p.6; Foucault 1978; Deleuze 1988, 1992; Hardt and Negri 2000, p.23,24,25 cited in Antoniades 2018, p.6

<sup>258</sup> Ibid., p.6

<sup>259</sup> Ibid., p.7

<sup>260</sup> Ibid.

<sup>261</sup> Ibid., pp. 7-8

<sup>262</sup> Clark 2011, 2009

understandings of hegemony, the one based on material predominance, and another resting on normative cohesion.<sup>263</sup>

The first he refers to as the mainstream and pretty self-evident one, namely the one associated with power-predominance expressed either in terms of aggregate material resources possessed by a single state or its systemic distributive and rules and normative expression,<sup>264</sup> while the second shifts away from the qualities of a hegemon, and refocuses our attention on the needs and expectations of “others” about the latter.<sup>265</sup> While the Waltzian kind of neo-realism has an automatic transformation linkage between material capabilities and leadership, i.e., the expression of capabilities in an anarchical system of international relations creating authority as such, other IR scholars moved in a different direction, namely the one of the consensual element of leadership. However, they started with the same issue at their hand.<sup>266</sup> Focusing on the consensual element of domination present in hegemonic orders makes the linkage of hegemony and legitimacy stand out, with the latter usually assumed while speaking of hegemony; however, not appropriately elaborated, especially within the materialist accounts of the former.<sup>267</sup> Ultimately, it revolves around investigating possible mechanisms for the accountability and self-restraint of a powerful hegemon concerning the weaker states.<sup>268</sup>

The focal point of this issue is the basis of compliance from the side of the weaker states, with most of the accounts pointing to the latter’s self-interest as the primary basis for the hegemon’s legitimacy, which appears to Clark as a puzzling situation since for him the difference between legitimacy and compliance out of self-interest, in principle, shows the same degree of essential difference as the one between consensual compliance and the one stemming from coercion.<sup>269</sup> For Clark, this problem is especially evident in various versions of the hegemonic stability theory, emphasizing the public goods provision and the benefits acquired by the smaller states, on par with the neo-Gramscian conceptualizations of hegemony.<sup>270</sup> This is so since this legitimacy of predominance is thought of, in the case of neo-Gramscianism and HST, as produced by the predominant actor, and dominated actors in some unclear ways are made to believe that the normative underpinning of hegemonic legitimacy is the best guarantee for their interests to be served – it neither clarifies the sources of the latter legitimacy nor its mechanics, instead, the rationality of interests is equated with the ideational framework propagated by the dominant actor(s).<sup>271</sup>

Acknowledging this limitation of such a view of hegemony as a legitimate consensual order, he refers to Ned Lebow and his elaboration of the latter based on the rapprochement of the Ancient Greek *hegemonia*.<sup>272</sup> Clark commends Lebow’s attempt to separate legitimacy and self-interest yet regrets the absence of a further elaboration of the sources of the former and turns to some neo-Gramscian attempts to fill this gap with the quality of leadership, precisely the moral quality supplied by a hegemon.<sup>273</sup> For Clark, the critical part of Lebow’s argument concerns the self-restrained behavior of the dominant state in the absence of external control as an essential element of the quality mentioned

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<sup>263</sup> Dent 2008c, p.280; Lee 2010, p.2 as cited in Clark 2011, p.19

<sup>264</sup> Stiles 2009, pp.2-3; Cox 1993, p.264; Ikenberry and Kupchan 1990, p.49; Keohane 1989, p.234; O’Brien 2002, pp. 3-4; Vitalis 2006, p.26 as cited in Clark 2011, p.19

<sup>265</sup> Brilmayer 1994, p. 224; Crawford 2004; Lee 2010, p.23. Rapkin 1990b cited in Clark 2011, p.20

<sup>266</sup> Haugaard 2006b, p.50; Simon 1982, p.21 cited in Clark p.20

<sup>267</sup> Brooks and Wohlforth 2008, p.207; Griffiths 2004, p.65; Ikenberry and Kupchan 1990, p.51; Paupp 2009, pp.46–67; Joseph 2002, p.1; Keohane 1984, p.39; Mastanduno 2002, pp.181-183 cited in Clark 2011, p.20

<sup>268</sup> Lebow 2003, pp.283–284; Brilmayer 1994, p.221; Hinnebusch 2006, p.284 cited in Clark 2011, p.20

<sup>269</sup> Hurd 1999; Hurd 2007a, p.69 cited in Clark 2011, p.21

<sup>270</sup> Keohane 1989, p.78; Layne 2006b, p.17; Adamson 1980; Burnham 1991; Cafruny 1990; Cox 1996; Fontana 1993, 2006; Gill 1993a; Rapkin 1990a; Sassoon 1982 cited in Clark 2011, p.21

<sup>271</sup> Lukes 2005, p.27; Lee 2010, pp.8-10; Cox 1996, p.136; 1987, p.7; March and Olsen 1998, p.949; Hurd 2007a, pp.73-74 as cited in Clark 2011, p.22

<sup>272</sup> Lebow 2003; Lebow and Kelly 2001, p.595 cited in Clark 2011, p.22

<sup>273</sup> Augelli and Murphy 1993, p.130; Cox 1993, p.264; Fontana 1993, p.140; Gill and Law 1993, p.93; Stiles 2009, p.10; Buciglucksman 1982, p. 120 cited in Clark 2011, p.23

above of leadership as a necessary condition for the sufficient legitimacy of the hegemonic order.<sup>274</sup> Ultimately, Clark elaborates on possible adaptations from the neo-Gramscian perspective that might be useful for the English School strand of IR theory.<sup>275</sup> In particular, he attempts to draw a linkage between the neo-Gramscian emphasis on “false consciousness,” the inability to imagine alternatives to the hegemonic order is perfectly suitable for the ES’s focus on socialization through institutions, which in their turn supplant the framework of legitimate behavior which allows for the hegemon’s acquisition of the leader’s identity.<sup>276</sup>

Finally, the most readable and comprehensive review of hegemony and its usage in IR is the one provided by Brian Schmidt.<sup>277</sup> In his conceptual analysis of hegemony, he concluded that generally speaking, the variety of conceptualization of hegemony can be summarized as divided into two broad conceptualizations, namely the one which pertains to the overwhelming material power concentration and another which points to the exercise of some form of leadership; this division, in his view, apart from the distinction between the attributive and relational character of hegemony, does not tell us much with a linkage to specific schools of IR, thus making him go in some details concerning particular elaborations of the concept across the disciplinary, theoretical spectrum.

The first school he approaches appears to be Realism. Here, hegemony is mainly associated with the utmost power concentration and the ability and willingness to use it. The former is operationalized as material and non-material resources, ranging from military to diplomatic power.<sup>278</sup> For some realists, hegemony’s defining feature is the loosely conceived military capabilities; for others, it goes for the more abstract ability to dominate all other states in the system.<sup>279</sup> The latter approach allows one to approach another way of conceptualizing hegemony within the tradition, namely the structural view of hegemony, where it is seen more as a specific structure of the international system, with the closest result being empire; moreover, most of the recorded human history, according to this view on hegemony, shows the international system’s propensity for this kind of structural organization characterized by lower levels of anarchy and those higher of hierarchy.<sup>280</sup> In its turn, this conceptualization opens the way for the realist tendency of conflating hegemony with unipolarity, namely the system where the logic of balancing has failed, and the causal arrows reversed, i.e., the stronger the dominant state becomes, the less the chances that a balancing process would start.<sup>281</sup> This tendency leads those who adhere to such a view to discount the leadership (relational) component of hegemony heavily, thus neglecting hegemony as a result of intentional actions rather than just a concentration of power and making them face a paradoxical dilemma – if unipolarity equals hegemony, how one differentiates between a mere power concentration and achievement of particular ends with the help of the latter power predominance?<sup>282</sup>

The way to address this inherent weakness of the realist focus on power predominance, according to Schmidt, comes in the form of hegemonic stability theory, which stipulates that with power predominance comes the ability and almost the obligation to increase the levels of international cooperation through the creation of international institutions and regimes, that in their turn, lead to higher levels of economic and political

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<sup>274</sup> Lebow 2003, pp.283-284; Walt 2002, p.153; Lebow 2003, p.126 cited in Clark 2011, p.23

<sup>275</sup> Onuf and Klink 1989, p.160; Cox 1996, pp.55-6; Cox 1996, p.136; Gill 1993b, pp.39-40; Worth 2009, p.21; Lee 2010, p.16 cited in Clark 2011, p.23

<sup>276</sup> Cox 1996: 99 Lee 2010: 16 cited in Clark 2011, p.23

<sup>277</sup> Needless to mention that such a labelling is relevant only with regard to the reviews mentioned in this introductory subsection so far, and only with regard to the purposes of this chapter.

<sup>278</sup> Schmidt 2018, pp.4-5; Schmidt 2005, Baldwin 2013 cited in Schmidt 2018, p.5

<sup>279</sup> Ibid., p.5; Waltz 1979, p. 131; Posen 2003, pp. 5-46; Levy and Thompson, 2005; Mearsheimer 2001 p. 41 cited in Schmidt 2018, p.5

<sup>280</sup> Ibid., p.6; Gilpin 1981, p. 29; Layne 2006, p. 4 cited in Schmidt 2018, p.6

<sup>281</sup> Ibid., pp. 6-7; Wohlforth 1999, p. 9; Brooks and Wohlforth 2008, p. 48 cited in Schmidt 2018, 6-7.

<sup>282</sup> Ibid., pp. 7-8; Beyers 2009, p. 413; Fettweis 2017, p. 432; Wilkinson, 1999, pp. 141-172 cited in Schmidt 2018, pp.7-8

stability.<sup>283</sup> This “stability provision” is not just automatic but also stems from the hegemon’s evident self-interest; however, others still benefit more, thus “anchoring” stability into the existence of the dominant state, and making the institutional and normative framework an unavoidable byproduct of this stability provision.<sup>284</sup>

Following the review of the realist understanding of hegemony comes Schmidt’s analysis of the neo-liberal understanding of the latter, and compared to the former, he notices the solid neo-liberal emphasis on leadership as the basis of hegemony – although they acknowledge the material underpinnings of a hegemonic order; nevertheless, they pay more attention to the non-material mechanisms of operation of the latter.<sup>285</sup> An exemplary case of such an approach, according to Schmidt, is Keohane’s couple of the “basic force model” and the “force activation model,” with the former referring to the tangible power predominance and the latter including the previous one on par with the ability/desire/willingness to exercise leadership – in other words, hegemony is not just the power predominance and the institutional framework established by the hegemon, but also the latter’s willingness to maintain order under the rules mentioned above.<sup>286</sup> Moreover, this kind of hegemony, according to neo-liberals, appears to be more durable since it is based on a sufficient degree of consent – this is so due to the implicit “exchange” present in the order, namely the one where leadership on the side of a hegemon is traded for the deference on the side of the secondary states.<sup>287</sup>

Approached differently, hegemony, from a neoliberal perspective, might be perceived as an international order based on rules and international regimes created by the predominant state, similar to empire, yet characterized by liberal elements present in its structure, namely maintenance of a system of rules and institutions, public goods provision, and a network of communication for reciprocal influence – contrary to an empire, the liberal hegemonic order is based on the power of the predominant state, yet operates on the consensual basis and revolves around the shared interests and the rule of law, which evolve into the direction of self-restraint from the side of participating states.<sup>288</sup> The crux in this perspective is that hegemony appears to be a result of a bargain between the dominant and the secondary states, with the latter agreeing to join the order and the former placing sufficient self-restraint on its behavior, thus moving the source of the hegemon’s authority to the legal-constitutional foundation away from the material power predominance, and ultimately conditioning its stability and longevity on the former’s rule-abidance and self-restraint.<sup>289</sup> Finally, the neo-liberal approach, in Schmidt’s view, is peculiar due to the attention paid to the ideational factors and their role in establishing and maintaining the hegemonic order; in particular, it concerns the notion of “hegemonic socialization” which pertains to the process of the internalization of the hegemonic norms by the elites of the secondary states through social interactions within the international system, either through bilateral or multilateral/institutional channels.<sup>290</sup>

The following theoretical perspective that Schmidt approaches is the neo-Gramscian one, emphasizing the non-material basis of hegemony through the norms and values diffusion, or more specifically, universal normative conceptions propagated by the hegemon as the distinctive feature of the primary source of the order’s stability and feasibility.<sup>291</sup> More than this, neo-Gramscianism, according to Schmidt, puts material and

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<sup>283</sup>Ibid., pp.8-9; Lake 1993, p. 460; Keohane 1984, p. 32; 1980, p. 132; Krasner 1983, p. 2 cited in Schmidt 2018, pp. 8-9

<sup>284</sup>Ibid., p.9; Krasner 1983, p. 2; Gilpin 1987, p. 72; 1980, p. 132 cited in Schmidt 2018, p.9

<sup>285</sup>Ibid., 2018, p.10

<sup>286</sup> Ibid., Keohane 1984, p. 34 cited in Schmidt 2018, pp. 10-11

<sup>287</sup> Ibid.,p.11; Keohane 1984, p. 46; Ikenberry 2011, p. 70 cited in Schmidt 2018, p.11

<sup>288</sup> Ibid., pp.11-12; Ikenberry 2011, p. 70, 71-72, 74, 55, 61 cited in Schmidt 2018, pp.11-12

<sup>289</sup> Ibid., p.12; Ikenberry 2002, p. 215; 2001, p. 83; Gilpin 1987, p.73 cited in Schmidt 2018, p.12

<sup>290</sup> Ibid., p.13; Ikenberry and Kupchan 1990, p. 285, 289 cited in Schmidt 2018, p.13

<sup>291</sup> Ibid., p.13; Cox 1981, p. 139 cited in Schmidt 2018, p.13

non-material factors into a dialectical relationship in the process of the hegemonic order formation and maintenance – put differently, hegemony incorporates both consent and coercion and unfolds as the sufficiently minimal unity of ideas material, and institutional structures located, however, not on the inter-state level, but the societal one, with its emanations on the former level being a byproduct of the hegemonic processes within the latter one.<sup>292</sup> Moreover, when one speaks of hegemony on the international level, it becomes a highly complex issue since the neo-Gramscian perspective leaves the state-centric box of theorizing and conceives the world hegemony as about such non-state elements as the global civil society, transnational social forces, and corresponding global mode of production which complement the conventional thematic realms of the study of the international such as anarchy and alike.<sup>293</sup>

Schmidt assumes that despite the neo-Gramscian refusal to give priority, within the hegemonic order, to the institutions built by the hegemon, it makes sense to speak of the latter as the primary channel for mitigating conflict, decreasing the level of coercion, and projecting ideological influence, with the last being of primary importance due to the universalization of the hegemon's norms and values among the subordinate states thus reassuring consensual participation in the order, and by extension, legitimacy of that order.<sup>294</sup> There are five essential features of the hegemonic international organizations (as a formal emanation of the international institutions), which Schmidt considers necessary to mention, are as follows: they act as an embodiment of the hegemonic rules and norms, appear to be the product of the hegemonic order themselves, legitimize the normative framework of the hegemonic world order ideologically, aim at coopting the elites of the secondary state and act as a shield and ideological “sponge” concerning the counter-hegemonic ideas.<sup>295</sup>

Although, according to Schmidt, the neo-Gramscian perspective introduced such a badly needed emphasis on non-material aspects of hegemony, the latter treatment falls short of accounting for the ideational components of the former, especially if compared to the constructivist one.<sup>296</sup> In particular, some constructivists argue that despite the ideational focus of the neo-Gramscian strand, the latter makes the institutional dimension of hegemony overly materialistic in the sense of being preoccupied with the former's reflection of the worldview and interests of the dominant state/classes. At the same time, the real puzzle concerns the reasons why the sheer masses in the secondary states accept the hegemon's world-view: they turn to the Gramscian concept, which in neo-Gramscianism, in their opinion and Schmidt's reading, was not given a full elaboration, namely the one of “common sense,” making it a structural variable and giving more theoretical prominence in their view of the international, namely the one akin to the distribution of power and identities.<sup>297</sup> In this way, hegemony, as the international order, or a particular type of dominance, is in place only when the general populace of the world accepts the hegemonic ideology; moreover, this acceptance takes place not through the direct and conscious following of the hegemon's ideology, but rather when the crucial elements of the latter penetrate the daily-reasoning, essential aspects of the individual's world-view, thus making it naturally correspond the dominant state's ideology.<sup>298</sup>

Finally, when Schmidt approaches the English School tradition, he primarily focuses on Clark's review of the ES's usage of hegemony. Subsequently, he pays particular attention to his attempt at developing the ES's theory of hegemony, which

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<sup>292</sup> Ibid., p.13; Cox 1981, p. 139; 1987, p. 7; Worth 2015, p. 66 cited in Schmidt 2018, p.13

<sup>293</sup> Schmidt 2018, pp.14-15; Cox 1982, p. 45, 38, 45 cited in Schmidt 2018, pp.14-15

<sup>294</sup> Ibid., p.15

<sup>295</sup> Ibid., p.16; Cox 1983, p. 172 cited in Schmidt 2018, p.16

<sup>296</sup> Ibid., p.16

<sup>297</sup> Ibid., p.16; Hopf 2013, pp.317-354, 318 cited in Schmidt 2018, p.16; Wang 2003, p. 101, 119 cited in Schmidt 2018, pp. 17-18

<sup>298</sup> Ibid., p.17; Hopf 2013, 321 cited in Schmidt 2018, p.16

conceives hegemony as an institution of the international society rather than an attribute of the dominant state or the resulting international order.<sup>299</sup> Examining Clark's review of the ES literature and the usage of hegemony allows Schmidt to conclude that the tradition generally shows significant reluctance to put the concept into the center of its theoretical landscape, which is not much of a surprise since the very foundational claim of the former speaks of the international society as its primary entity of interests. Hegemony is running in the opposite direction as conceived against the latter.<sup>300</sup>

However, Clark insists that the reality of international politics makes it necessary for the tradition to develop its understanding of hegemony and turns to the works of various ES scholars to elaborate on his view of hegemony as an institution or put differently to approach the issue of legitimacy in the circumstances of the utmost power concentration within the international system.<sup>301</sup> With this move, he tries to substantiate the claim that the international "society" might be compatible with the power predominance on the side of one state; however, only if conjoined by some form of legitimate leadership since the former is nothing more than a mere distribution of power. At the same time, the latter refers to a standardized practice that acquires a degree of legitimacy from international society.<sup>302</sup> Clark, in Schmidt's reading, turns to the works of Hedley Bull and the idea of the institution of the great powers as a helpful analogy for conceptualizing hegemony as an international institution; in particular, it goes about the managerial functions performed by the great powers within the international, as opposed to the material power capabilities possessed by them.<sup>303</sup> In this reading, hegemony is the status given by others, which forms a particular social capital on the side of the dominant state and the respective obligations and management of achieving the collective goal.<sup>304</sup>

As one can easily observe, all of the previous reviews, if one assumes that the capsule reading of them was structurally and semantically precise, suffer from some generalization fallacies and limitations imposed by the purposes of the respective works. In other words, to recapitulate an earlier point, it becomes nearly impossible for the novice in hegemonic problematique to get a relatively precise and all-embracing picture of the thematic field without suffering the consequences of the context and conceptual specifics omission. In the best case, it leads to a tremendous time loss on the side of the novice to familiarize herself properly with the respective literature. However, the chances for a proper and adequate understanding could be higher. In the worst case, however, the former risks receiving a misleading impression of "getting things right" by focusing on the mere conceptual couples of the material vs. non-material factors and coercive vs. consensual dominance. The following extensive review of the IR literature on hegemony attempts to provide a "security framework" against such a dangerously simplistic understanding of hegemony in IR.

## 2.1. Classical and structural realism: from a borrowed concept to hegemonic wars

As an intellectual current, realism is the backbone of Western thinking about the international and a conceptual basis of "doing" international relations shared by many practitioners worldwide.<sup>305</sup> Its march towards this primacy is conventionally associated with the consequences of the Great War and its subsequent emanation in WWII.<sup>306</sup> This section avoids involvement in any internal or external critique of the tradition's primary

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<sup>299</sup> Schmidt 2018, p.18; Clark 2009, p. 24 cited in Schmidt 2018, p.18

<sup>300</sup> Ibid., p.19

<sup>301</sup> Ibid.; Clark 2011, p. 5 cited in Schmidt 2018, p.18

<sup>302</sup> Ibid., p.19; Ibid., p. 34 cited in Schmidt 2018, p.19

<sup>303</sup> Ibid., p.20; Ibid. cited in Schmidt 2018, p.20

<sup>304</sup> Ibid.; Ibid., pp. 242, 51 cited in Schmidt 2018, p.20

<sup>305</sup> Lobell et al. 2009, Goodin 2011, Russell 2000, Donnelly 2000.

<sup>306</sup> Legro and Moravcsik 1999.

assumptions. Instead, it attempts to sketch the conceptual fortunes of hegemony, although on a limited scale and with modest coverage. This sketch is done in terms of Realism itself, meaning that no reference is made to other theoretical currents and their word usage. Moreover, if any critical points are made, they refer to the ups and downs of hegemony within Realism, and external comparison is essentially absent. However, before one proceeds to hegemony itself, it is necessary to make a short recap of the main assumptions of the intellectual tradition, which had come to be termed Realism.

It is not by chance that the term used to refer to Realism throughout the previous passage was tradition rather than theory. Realism is ‘an approach to international relations that has emerged gradually through the work of analysts who have situated themselves within, and thus delimited, a distinctive but still diverse style or tradition of analysis.’<sup>307</sup> Thus, this would not be an exaggeration to call realism a general intellectual orientation regarding issues about international relations. Essentially, Realism is constituted by a set of assumptions about international politics. First and foremost, it is human nature. There is barely a Realist who would not point to the evil elements of human nature and egoistic passions driving men’s actions.<sup>308</sup> In Hans Morgenthau’s words, the outcome of the deficiencies of human nature is “the tragic presence of evil in all political action”<sup>309</sup> Moreover, Realists assume that there are clear limits on the possibility of “bettering” the men if this possibility exists at all.<sup>310</sup> However, human nature alone is insufficient to account for the conflictual nature of the international. For Realists, another determinant factor in explaining the dynamics of international relations is the international anarchy or the absence of the overarching international authority akin to the one found in domestic politics. If human nature is tamed and suppressed by the social hierarchy within the domestic setting, international anarchy amplifies the former.<sup>311</sup> The interplay of anarchy and human nature makes international politics a realm of power and security, with the latter achieved only by the former.<sup>312</sup> Finally, this set of assumptions about the nature and daily working of the international realm makes Realists conclude that there is no place for individual morality when one speaks of international politics. In other words, morality finds itself at the service of the state interests, which are essentially about the struggle for power and security.<sup>313</sup>

After this short recap of the main assumptions defining Realism as an intellectual current, it now seems possible to move toward the issue of hegemony and its usage within the tradition. As one might easily guess, the term is neatly incorporated into the theoretical framework based on the struggle for power, anarchy, and the inadmissibility of moral considerations regarding the international. Yet, it turns out that the term’s semantics are much broader than the framework mentioned above, making Realists always feel uncomfortable with the concept, although making it is one of the most frequently used terms.

### 2.1.1. Inherited concept and oscillating semantics

There is no surprise that while speaking of hegemony and realism, one starts the story with Hans Morgenthau. The usual reference to Morgenthau would point to his role as an exiled scholar implanting the European ways of thinking into the fertile American intellectual soil, thus establishing a foundation for the discipline of International Relations. However, this part of the work has a different motivation for the essential reference - his role in

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<sup>307</sup> Feng, L., & Ruizhuang 2006, Donnelly 2000.

<sup>308</sup> Donnelly 2000.

<sup>309</sup> Morgenthau 1946, p.203.

<sup>310</sup> Thompson 1985, p.17.

<sup>311</sup> Butterfield 1949, p.44.

<sup>312</sup> Gilpin 1984, p.290; Schwarzenberger 1951, p.147; Waltz 1979, p.186.

<sup>313</sup> Morgenthau 1965, p.9.



shaping the blurred and situational usage of hegemony within IR vocabulary. Being the contemporary of the Versailles Treaty and writing around the high period of the Cold War, he uses the term as a part of the inherited vocabulary of European political thought – neither putting too much emphasis on it and laboriously clarifying its semantics nor altogether avoiding it.<sup>314</sup> This situation might be attributed to the term not being of real need and importance for him since the very international dynamics of the day were alien to its classical usage. In other words, how is it possible to speak of hegemony in its classical sense if international politics are characterized by the presence of two superpowers, i.e., the bipolar system? This makes the term initially applied to the city-states’ alliances and the European balance of power, devoid of any momentary meaning and practical applicability - the concept serves the purpose of arguments whose theoretical emphasis is far from its conventional semantics.<sup>315</sup>

Concerning Morgenthau’s view on international politics and the place the balance of power politics occupy in the former, hegemony occupies a secondary place. The balance of power is conceived as a mechanism against the irresistible will for power and domination within human nature. In this respect, hegemony is just a euphemism for the utmost disequilibrium and analogues to imperialism. In his own words, the latter can take three primary forms, namely world domination, local power predominance, and “an empire or hegemony of approximately continental dimensions”<sup>316</sup> Ironically, in his account, the balance of power, as an equilibrium of the power distribution, is not only an opposite to imperialism and hegemony, but on some occasions is the source of the latter. Overall, conceived in this way, hegemony, and paradoxically opposite to Morgenthau’s “scientific view” of international politics, it acquires a negative normative flavor, namely that of the purest expression of the negative side of human nature, its inclination to domination. This is the move that one might easily link with the inherited character of the term, with the negative connotation it acquires when the semantics shift from the Greek *time* to the one of *arche*.

However, subsequently, Morgenthau arrives at a normative-semantic loopback concerning hegemony.<sup>317</sup> The concept frees itself from the vicissitudes of human nature as the driving force of international politics. It takes a form of a self-restrained predominance for the sake of the anti-imperialist agenda.<sup>318</sup> The context of the Cold War and his work in the US might be taken as one of the possible explanations for the loopback mentioned above. Now, in the face of the fight against possible domination from the side of the Soviets, the free world needed a hegemon to lead this fight. It is hardly possible to conceive of such a hegemon to be linguistically framed as the one who *dominates* rather than *leads*. This, in turn, again might be seen as a situationally conditioned reversal of the previous Greek couple of honor and power to the advantage of the former.

This semantic twist is also found in Nicholas Spykman when he refers to the possibility of a self-restrained hegemony. Similarly, he uses the case of the US and its foreign policy in the Americas within the five decades preceding WWII.<sup>319</sup> More than this, akin to the early Morgenthau, he locates hegemony, not as an isolated deviation from the balanced distribution of power but conceives it as the ultimate and unattainable outcome of one of the trends which characterize the international realm, namely the inclination to conquest and confederation: however, due to the limitations imposed by the nature of the international, this end is achievable only within the regional setting.<sup>320</sup> Arnold Wolfers, in

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<sup>314</sup> Morgenthau 1960a

<sup>315</sup> Morgenthau 1946

<sup>316</sup> Morgenthau 1962

<sup>317</sup> Morgenthau, 1960b

<sup>318</sup> Anderson 2017, p. 22

<sup>319</sup> Spykman 1942, p.62.

<sup>320</sup> Ibid, pp. 16, 20, 62, 89, 176, 177, 195, 198.

his turn, treated hegemony similarly; however, with quite the opposite view on benevolent hegemony.<sup>321</sup> Wolfers argued that any attempts to build *just* hegemony on a collective basis are doomed to fail and increase the likelihood of conflict in the long run: this has to do not only with the internal balance of power of such a hegemony but also with the very nature of politics, thus making him agree with Lord Acton on the absolute corruption, the total power brings<sup>322</sup>. This way of looking at hegemony is not only a reference to historical cases present in Ancient Greek history and the latter's elaborations concerning those cases but also a hint to the variability of internal structure and power dynamics of hegemonic orders on par with the future conceptualizations of collective hegemony present in such authors as Ian Clark.<sup>323</sup>

Raymond Aron<sup>324</sup> was similar to Morgenthau in his treatment of hegemony. He injected the term into his four-fold typology of peace: peace by equilibrium, hegemony, empire, and peace by terror. The first implies a roughly equal distribution of power, the second a domination of one state over others, while the third refers to a verge of political and territorial absorption.<sup>325</sup> However, neither of the three referred to the condition of the Cold War: for Aron, it was the peace by terror which described the contemporary international reality, which in its turn did not imply an equal distribution of power between the two superpowers but rather their ability to destroy each other, and as a consequence leading to a political stalemate.<sup>326</sup> In such a way, one can see that such a treatment of hegemony falls into the same semantic trap as previous realists. When asked for a clear and precise definition, it turns out to be equated with a specific balance of power, although additional "hidden" semantics are lurking all over the text. On another occasion, Aron devoted some effort to distinguishing between empire and hegemony. If the former implied a state's ability to impose its will on others, hegemony referred to a situation of leadership. In particular, Aron stipulated that despite its imperialist policies in Latin America, the US was still not an empire but rather a benevolent hegemon exercising its leadership, akin to the one found in the case of its role within the Atlantic Alliance in a fight against Communist Russia.<sup>327</sup> Thus, we have a peculiar attitude toward US dominance. In the same vein as Morgenthau, while calling for the US hegemony in the fight against the USSR, Aron contradicted his earlier arguments. Specifically, it goes about his observation that historically, there were barely any hegemons found that ultimately did not abuse their power, with no regard to the initial leitmotif of the hegemony.<sup>328</sup> This situation is again peculiarly specific to the high Cold-War period when the European emigre scholars had to employ a term that would explicitly imply a secondary role of power predominance and shift the semantic focus to the consensual element of domination.

E.H. Carr is among those classical realists who devoted significant attention to the ideational dimensions of the power predominance referred to as hegemony. In the same manner as with Morgenthau, one can easily observe that the term is also a part of the classical vocabulary since he does not define the concept; however, he uses the word several times throughout his *The Twenty Years Crisis*. He links the term to creating and maintaining ideational constructs that necessarily follow any power predominance.<sup>329</sup> Moreover, these constructs taking a form of a specific version of *internationalism*, have as

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<sup>321</sup> Wolfers, 1962.

<sup>322</sup> *Ibid.*, p.122.

<sup>323</sup> Clark 2011.

<sup>324</sup> Including Aron in the section on Realism is quite a risky decision due to the eclectic character of his works, and a well-known distaste for any theoretical "labeling". However, in retrospect, the classical realism subsection appears to be the only suitable place for mentioning Aron and his usage of hegemony.

<sup>325</sup> Aron 2003, pp.5-8

<sup>326</sup> *Ibid*

<sup>327</sup> Aron, 1973

<sup>328</sup> Aron, 2003

<sup>329</sup> Carr 1946, pp. 85-86

their primary goal the strengthening of the control over the international system through calls to unification: it is not just the supervision of this process but also the dominant role within the resulting order, which is prescribed to a hegemon.<sup>330</sup> Finally, any internationalism, as a reflection of a particular hegemony, presupposes a fragile balance between the right of the strongest and the concessions to the weak, which, when broken, signifies the inevitable destruction of hegemony.<sup>331</sup>

Ironically, Carr may be the most rarely mentioned author whenever there is a discussion of hegemony in its realist emanation. This situation can be considered ironic since it is hardly possible to find a textbook on IR theory or realism as a separate theoretical current that does not mention him as a founding father of realism. More than this, his usage of hegemony, the surrounding theoretical context, and his typology of power raise extreme suspicion concerning the theoretical position of a state's material capabilities. His emphasis on a synthetic character of power, comprised of material and cultural elements, or power over opinion, was evident.<sup>332</sup> The latter, in its turn, finds its expression internationally in the form of international prestige, which acts as a universal power benchmark – coupled with the rules of the system mentioned above in the form of a particular version of internationalism, the international prestige is precisely the mechanism, which ensures the resort to violence, i.e., an open military confrontation, comes to be seen as essentially unnecessary. However, this mechanism works in the case of a match with the material capabilities of the dominant state - in case there is a disjuncture between the two, the very ideational constructs created for the sake of maintaining peace and stability become the primary drivers for conflict and destruction of the existing order.<sup>333</sup>

Thus far, realist hegemony, at least in its classical version, despite its clear and firm connection with the balance of power, was something more than a mere power predominance. While being preoccupied with the conflictual nature of the international, which stems from the corrupt human nature, and defines one's obsession with power and security, classical realists preserved, although sometimes unwillingly, the political dimension of the term so evident in its ancient Greek usage.<sup>334</sup> In other words, one might say that a significant degree of scientific rigor was sacrificed, again most likely unwillingly, to preserve the implicit semantic connection with a more significant intellectual landscape the term belonged to.<sup>335</sup> The subsequent resort to the economic analogy and systemic thinking increased the tradition's ability to theorize the international; however, it significantly decreased its ability to grasp the peculiarities of the patterns and dynamics of domination.<sup>336</sup> The subsequent comprehension of these limitations is most evident in the rise of the realist version of the hegemonic stability theory and its apogee in the Gilpinian hegemonic war theory. Yet, before one proceeds to Gilpin, it is necessary to account for what is written on hegemony within what can be tentatively referred to as a structural version of Realism comprised of a variety of authors, sharing some basics concerning the former term, yet quite often diverging significantly in specifics.

### 2.1.2. Unipolarity and hegemonic stability

It would not be much of an exaggeration to say that apart from Morgenthau and his detached usage of hegemony, the structural strand of Realism makes the term drown in simplifications and contradictions. The famous Waltzian argument concerning the distribution of capabilities as a systemic feature makes hegemony lose its political and

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<sup>330</sup> Ibid.

<sup>331</sup> Ibid., p.168.

<sup>332</sup> Ibid., pp.102-146, especially 132-145

<sup>333</sup> Ibid., pp.46,54, 85-88

<sup>334</sup> Anderson 2017, p.24.

<sup>335</sup> Ibid.

<sup>336</sup> Barkin 2010.

relational flavor, which was already barely felt in Morgenthau.<sup>337</sup> Since what matters the most is not the politico-ideational structures coupled with the material predominance but rather a distribution of capabilities across the international system, making hegemony easily conflated with unipolarity.<sup>338</sup> And if for defensive neo-realists such as Waltz himself, hegemony is highly unlikely to be achieved, and could be only of a momentary character, the offensive camp puts hegemony at the center of its conceptual pedestal (of course, on par with power).<sup>339</sup>

In his famous line, Mearsheimer defines a hegemon as a state that can dominate other states, and this ability stems from the hegemon's unrivaled power.<sup>340</sup> In a less frequently quoted line, he defines hegemony's essential feature as "a power gap between the potential hegemon and the second most powerful state."<sup>341</sup> The term's central position within his theoretical universe is based on the premise that hegemony is "the best guarantee for survival." Since the anarchical nature of the international makes survival the ultimate goal of any state, by a logical extension, hegemony is the ultimate goal of every state. Despite several remarks concerning additional characteristics of hegemony, like the inability to achieve global hegemony<sup>342</sup> or different strategies states use to contain the rising hegemon,<sup>343</sup> hegemony, in his account, is not much more than a mere unipolarity. Yet, his understanding of hegemony is essential in a different way. In particular, if, for classical realists, hegemony is the result of the human inclination for domination and conflict,<sup>344</sup> Mearsheimer, hinging on the Waltzian understanding of the international structure, sees the drive for hegemony as conditioned by the latter.<sup>345</sup> In this sense, the structure induces states to seek more power endlessly, ultimately never satisfied with anything but total domination, contrary to the Waltzian view where states seek minimum security with occasional deviations from this logic.<sup>346</sup>

Richard Betts, in his turn, is more explicit in this respect and conceives of hegemony as unipolarity as the absence of another pole of power.<sup>347</sup> A similar definition is given by Randal Schweller when he equates a hegemon with a unipole.<sup>348</sup> More than this, the logic of equating hegemony with unipolarity, is most evident when one starts to speak of bipolarity in terms of hegemony, and the former comes to be denoted as bipolar hegemony.<sup>349</sup> Ultimately, the economic analogy between hegemony and monopoly makes it quite apparent that many neorealists tend to downgrade the former to simple unequal power distribution, although of an outstanding character.

Although different Realists ascribe various levels of importance to other forms of material capabilities, the military might holds an ultimately defining position in almost all of the neo-realist and neo-classical accounts.<sup>350</sup> Eventually, one should not be misled by many neo-classical interpretations where the emphasis shifts to the intra-state coalitions, political perception, the quality of diplomatic corpus, etc., since all of them share as a conceptual bottom line the old Waltzian maxims regarding power and structure of the international.<sup>351</sup> Thus, it is of no surprise then that when one speaks of Realism and

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<sup>337</sup> Waltz 1979, pp. 74, 91, 93, 97, 98, 99, 105-106, 107, 116-128.

<sup>338</sup> Wohlforth 1999, p.9; Brooks and Wohlforth 2008, p.48.

<sup>339</sup> Waltz 1979, p.116-128; Mearsheimer 2014, p.40.

<sup>340</sup> Mearsheimer 2014, p.40.

<sup>341</sup> Ibid, p.45.

<sup>342</sup> Mearsheimer 2014, p. 140.

<sup>343</sup> Ibid, pp. 144,147,152,156,157.

<sup>344</sup> Morgenthau 1973.

<sup>345</sup> Mearsheimer 2014, pp.42-46.

<sup>346</sup> Waltz 1979.

<sup>347</sup> Betts 2012, p.26.

<sup>348</sup> Schweller 2008, p.10.

<sup>349</sup> Griffiths 2002, p.100.

<sup>350</sup> Levy and Thompson, 2005.

<sup>351</sup> Ibid.

hegemony, the latter is most frequently associated with the unrivaled military might.<sup>352</sup> More than this, such an approach to power, and as a consequence hegemony, makes the latter acquire attributive flavor, and as a consequence, all the problems and limitations linked to the latter view of power.<sup>353</sup> Finally, the association of capabilities possessed by states, or better to say, the distribution of the capabilities as a systemic variable, makes hegemony to be a systemic phenomenon rather than a set of attributes possessed by a state or a group of states.

At the same time, saying that only critics of Realism are aware of the limitations of such usage of hegemony is at least missing part of the story. Realists themselves are pretty aware of it – the latent semantics of the term were and are still haunting realists of all kinds, thus making them aim at overcoming the simplistic usage of the term. An intellectual “patch” used by Realists to overcome this problem finds its expression in the concept of leadership.<sup>354</sup> By linking hegemony to leadership, Realism fills the theoretical void left by its focus on material capabilities and their distribution across the international system.

The first formulation of this patch is associated with Charles Kindleberger,<sup>355</sup> who gave hegemony additional semantics, namely, a hegemon being a public goods provider.<sup>356</sup> In this account, hegemony acquires a clear economic connotation, referring to a situation when the most powerful state, despite its immediate burden, is preoccupied with providing the means necessary for the stable and smooth functioning of the international markets.<sup>357</sup> In this case, hegemony means leadership understood as material capabilities and willingness to use them for international public goods provision.<sup>358</sup> In this case, the connection between power and hegemony is the ability of a hegemon to direct resources to create those international public goods. Moreover, what is essential about his view on hegemony as leadership is that he sees it as a necessary condition for a global economic order to arise – without a predominant state, such order is cursed never to occur.<sup>359</sup> Kindleberger refers to the set of public goods provided by a hegemon as international economic stability.<sup>360</sup> Yet, for a more ordinary reader, it makes more sense to speak of the economic infrastructure provided by the hegemon: reassuring the existence of a stable and reliable medium of exchange, and the story of value, ensuring sufficient liquidity and protecting fundamental property rights.<sup>361</sup> This slippage into the language of economics might be attributed to the natural unease with which the US establishment and general public relate themselves to any narrative regarding the domination and subjugation of others.<sup>362</sup> Finally, the peculiar flavor of this view of hegemony is that such orders established by hegemons benefit all states in the system, not just the dominant state; moreover, smaller states benefit even more than the former since they enjoy only the benefits of it, without any costs imposed on them for the maintenance of the order.<sup>363</sup> Put differently, it is only a hegemon that can establish a stable economic international order that would benefit all members of the system, while smaller states are always cursed with a limited power base and personal interest. By introducing the economic element,

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<sup>352</sup> Posen 2003.

<sup>353</sup> Ibid.

<sup>354</sup> Layne 2006, p.4.

<sup>355</sup> Ibid.

<sup>356</sup> Kindleberger 1974, p.292; 1981, p.247.

<sup>357</sup> Ibid.

<sup>358</sup> Kindleberger 1986a, pp.841-842.

<sup>359</sup> Kindleberger 1973, p.305.

<sup>360</sup> Kindleberger 1973, p.292; 1981, p.247.

<sup>361</sup> Lake 1993, pp.462-463.

<sup>362</sup> Layne 2006, p.5.

<sup>363</sup> Betts 2012, p.27.

Kindleberger spoke of power and domination through the medium of the common good and international markets.<sup>364</sup>

Kindleberger, with his emphasis on public goods provision, might be said to set the ground for what David Lake calls the “leadership” strand of the HST research program, with the primary dividing line within this strand being the question of the benevolence of the leadership exercised by a dominant actor.<sup>365</sup> In particular, it goes about the ratio between benevolence and exploitation by the hegemon throughout the “stabilization” process.<sup>366</sup> The former case pertains to a situation when the dominant state acts “unilaterally,” or at least pays the highest relative price for the provision of international stability, and effectively is not willing/not able to tax smaller states for the latter provision; while the latter case the dominant state can seriously tax the smaller state or make the bear the whole burden of stability provision.<sup>367</sup>

Another strand of the HST defined by Lake is the hegemony theory. The difference with the leadership strand appears to revolve around the primary reason for the necessity of hegemonic presence. In particular, for the latter, the immediate problem is the issue of free-riding, and the hegemon needs to be in place to overcome it, either through coercion or burden-taking; for the former, the primary point is the variety of economic preferences held by various actors.

Robert Gilpin, and his version of the hegemonic stability theory (HST) and power dynamics, might be seen as an attempt to marry Kindleberger’s thesis with a reaction to the neo-liberal version of HST.<sup>368</sup> He attempted to bring back the political glitter of hegemony.<sup>369</sup> His move was primarily methodological rather than conceptual, namely shifting an emphasis to the dynamics of hegemonic struggles and framing the absence of major conflicts as the international public good.<sup>370</sup> Moreover, unlike Kindleberger, he did not limit himself to the economic perspective as an ideological shelter from the questions of domination. Instead, the chosen view resembled the synthetic perspective found in Carr, with his simultaneous accent on material and non-material factors, yet with the ultimate priority being given to hard power. Instead of focusing on mere power distribution in its military or economic emanations, Gilpin explored a broader framework of economic and political factors of stability and conflict.

## 2.2. Neo-Liberalism: regimes and institutions, soft-power, and elites’ socialization

Neoliberalism, seen as the heir of the liberal tradition of theorizing in International Relations, arose as a challenger to the then-dominant classical and structural tenets of realism. Members of this perspective do agree that realism plays a vital role in distilling the essence of world politics with its emphasis on the permanent threat of war, states’ obsession with their security and survival, on par with the military force as the primary tool for achieving desired ends within the international. However, things have changed, and contemporary global politics are far from the image of hard-core realists since military security has lost its importance within the states’ framework of interests, and military force has lost its efficiency and usability as a tool for achieving political ends.<sup>371</sup>

Instead, what we see nowadays as the essence of international politics is better captured by such concepts as “interdependence,” or better to say, “complex

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<sup>364</sup> Anderson 2017, p.37

<sup>365</sup> Ibid.

<sup>366</sup> Yarbrough & Yarbrough 1992, p.50.

<sup>367</sup> Ibid.

<sup>368</sup> Lake 1993, p. 459.

<sup>369</sup> Although Gilpin within this work is mentioned among and in connection with the neo-realist authors, it should be mentioned that this typology is in the best case a situational one, and in the worst, a problematic one (Mastanduno, 2014, p.162; Kirshner, 2014; Gilpin 1986, p. 304).

<sup>370</sup> Ikenberry and Nexon 2019, p. 402.

<sup>371</sup> Axelrod & Keohane 1985; Keohane 1986, 1988; , Keohane & Nye 1975.

interdependence” and “soft power.”<sup>372</sup> Through the prism of the two, international politics are seen as characterized by an assortment of channels of interaction among the states covering not just the variety of “issue areas” but mutually dependent levels of interaction. This, in turn, leads not only to the diminishing efficiency of the use of the military force but also leads to an understanding that actors’ power may be diffused across those issue areas and levels, thus ultimately presenting world politics as composed of several power structures, with the assumed aggregate (total across all of the structures) of a state not being fungible across the latter.<sup>373</sup> In other words, the fact that one state possesses an overwhelming military power does not imply that it can be effectively used to achieve, for example, economic or cultural ends.<sup>374</sup>

This view of the international substantially stems from the way neo-liberals conceptualize the sources of power or power base in international relations. In particular, without denying the partial adequacy of the realist emphasis on the relationship between material resources as the basis of influence (understood as power), they nevertheless argue that the former’s aggregate distribution across the international system does not reflect the distribution of the latter. The primary reason for this argument is the neo-liberal claim that the material power base has to go through the process of conversion to translate into actual influence, i.e., the ability to achieve desired ends when the latter involves other actors, and this process scales down the initial material power possessed by a state.<sup>375</sup> Thus, they locate the sources of actual power within the analytical framework associated with the abovementioned concept of complex interdependence and institutional power owned by an actor rather than its aggregate material capabilities. The former is usually operationalized with the help of two additional concepts, mutual sensitivity, and vulnerability. The former refers to the extent to which a change in one country affects another country(-ies). The latter refers to the price country has to pay to adjust to a change in a relationship with another state(-s) rated against the price it has to pay to disrupt the latter.<sup>376</sup>

Yet to say there is a clear consensus on the measurement of interdependence among the neo-liberals is to miss a good deal of a story. Some see interdependence as measured only in terms of vulnerability, while others expand the auxiliary conceptual apparatus associated with the former.<sup>377</sup> In particular, when talking about operationalizing interdependence, one might speak of three indicators for measurement – the magnitude of interest, the extent of control, and the ability for substitution.<sup>378</sup> The three are used to analyze interdependence in the following situation: when one state, a less dependent state, supplies another state, a more dependent state, with a particular good (understood in abstract terms) essential to the former. The magnitude of interest, in this case, relates to the degree to which the goods supplied are critical for the more dependent state, with the extent of control pointing to the ability of the less dependent state to manipulate the delivery of the goods and the ability for substitution pointing to the substitution alternatives available to the more dependent state concerning the abovementioned good(s).<sup>379</sup> In this situation, the less dependent state’s control or power/influence is measured as a composite of the three indicators revolving around the good(s) supplied.

Moreover, the neo-liberal view of power basis made way for the development of regime theory since it allowed for a conceptualization of non-material factors’ constraining

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<sup>372</sup> Milner 2009; Grasa, & Costa 2007; Leira 2007; Keohane & Nye 1998; Katzenstein, Keohane, & Krasner 1998; Moravcsik 1997; Nye 2015, 2016

<sup>373</sup> Nye 1976; Pedersen, 2002; Beeson & Higgott, 2005; Keohane 1984, pp.31-46.

<sup>374</sup> Nye 1976, Keohane 1984, pp.31-46, Keohane & Nye 1973.

<sup>375</sup> Keohane & Nye 1973.

<sup>376</sup> *Ibid.*, p.36.

<sup>377</sup> *Ibid.*, p.37.

<sup>378</sup> Keohane & Nye 1984, p.38.

<sup>379</sup> *Ibid.*

influence on the states' behavior.<sup>380</sup> While international regimes are defined as a framework of norms, rules, and decision-making procedures shaping states' expectations in a particular issue area of world politics and are usually seen as established under specific material structural conditions, they are ultimately able to reduce conflict even in the absence of the latter material conditions.<sup>381</sup>

To acknowledge conceptual consensus and agreement about hegemony, specifics of its semantics, and conceptual usage within neo-liberalism, is to give too much credit to the intratheoretical homogeneity of the perspective. Moreover, hegemony stands in a paradoxical position concerning the latter's primary conceptual tool, complex interdependence. For some representatives of the theoretical strand, the argument concerning the non-fungibility of power across various realms of the international makes hegemony not possible in systemic terms, i.e., the global hegemony, leaving only separate issue areas for the latter.<sup>382</sup> For others, the non-fungibility of the power thesis is not taken at face value allowing someplace for hegemony in a more realist fashion. They diverge from the former by assuming a degree of hierarchy among the issue areas, thus viewing the complex interdependence as net property rather than an issue-specific one. Some issue areas are more important than others, and if some state acquires "influence" in many important issue areas, we might speak of the latter as a hegemonic state.<sup>383</sup>

Thus, this neoliberal view on hegemony, i.e., as a term suitable for the analysis of the current state of international relations, is based on a different understanding of the structure of the global system, at least if compared to their neo-realist peers. This structure is more about the distribution of mutual benefits and dependence arising and maintained based on the rules governing the relations between states brought in by the most potent state, namely the hegemon.<sup>384</sup> And again, this ability to create and maintain essential game practices by a hegemon comes not only from the latter's preponderant material power but also from its ability to shape the interests and orientations of less powerful states through the manipulation of benefits and losses.<sup>385</sup> This argument is in clear opposition to the neorealist view concerning the kind of goods hegemonic regimes produce: while for the latter, we speak of public goods produced by the hegemonic power, the former sees it more as a kind of club with the hegemon being in charge of distributing fruits of order, and punishing those breaking the rules, through exclusion from the club.<sup>386</sup>

In this sense, power is equated to complex interdependence or a state's position within a framework of dependencies across the issue areas. It turns out to be tripartite: first, it is linked to the state's position within the framework of "international goods" production, i.e., how much and what kind of goods a state can supply on par with the demand for those goods from another state(s) in the system; second, a state's position within the international regime, i.e., networks of distribution of benefits and costs associated with particular issue area, and its ability to set the rules governing the former; third, if a state is the only provider of a specific international good highly demanded by other states, and its supply is possible only through participation in the international regime set by the former, then we might speak of the degree of power possessed by this state.<sup>387</sup> With time passing, dependent interactions arising within the framework mentioned above become a full-blow power source allowing a state in the middle of it to control foreign-policy outcomes of other states in specific policy issue areas without recourse to the use of

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<sup>380</sup> Webb & Krasner, 1989.

<sup>381</sup> *Ibid.*

<sup>382</sup> *Ibid.*

<sup>383</sup> *Ibid.*

<sup>384</sup> Keohane 1984, Ikenberry 2019.

<sup>385</sup> Agnew 2005.

<sup>386</sup> Destradi 2010, p.914.

<sup>387</sup> *Ibid.*, p.915-917.



coercion.<sup>388</sup> Put differently, it becomes a fungible power resource by which the primacy in one issue area is easily converted to a significant degree of influence in another, operating primarily through the exclusion mechanism, be the latter related to security concerns, economic benefits, or overall international isolation.<sup>389</sup>

### 2.2.1. Regimes

Overall, the neoliberal perspective stays within the systemic, rationalist, and unitary actor confines on par with the initial emphasis on material power characteristic of neorealism; however, it provides a more nuanced understanding of power and, by extension, hegemony in international relations.<sup>390</sup> It does so through the aforementioned non-fungibility thesis and issue areas claim on par with conceptualizing international regimes as a source of power and complex interdependence as a cautious allusion to the non-material structural basis for hegemony. Yet to say that the previous passages present a coherent and all-embracing picture of the hegemony problematique within the neo-liberal strand is to make a barely defensible claim – one might quickly point to the neo-liberal association of hegemony with soft power or the aspects of hegemonic socialization on par with a more normative (rule-based) perspectives found with the latter strand, and which were not covered so far.<sup>391</sup> Thus, the remaining part of this chapter aims to cover several views on hegemony found within the theoretical strand and associated with specific authors to complement, or maybe even correct, the previous short description of the neo-liberal approach to theoretical issues related to hegemony.

First, it makes sense to turn to Keohane as the one whose views on the international informed most of the previous description of the neo-liberal perspective on international politics, power, and as a result, hegemony.<sup>392</sup> Apart from the abovementioned issue of international regimes, Keohane emphasizes such notions as cooperation and institutions pertaining to the hegemonic problematique.<sup>393</sup> First, he reformulates the neorealist assumption concerning the conflictual nature of the international as stemming from the political anarchy characteristic of the latter;<sup>394</sup> instead, the primary source of conflict is the economic one, namely the competition over the scarce resources nowadays mediated by the structure of complex interdependence.<sup>395</sup> Second, Keohane doubts the neo-realist assumption regarding the self-interested character of the states' rationality instead of arguing that much is defined by the tendency of states to cooperate and act based on the common interest achieved through the mechanisms of norms, rules, and procedures.<sup>396</sup>

In this way, we approach Keohane's understanding of hegemony which conceives the latter is an essential condition for the significant increase of cooperation levels among the states; however, once the latter is in place, the former loses its importance - one should keep in mind that hegemony for Keohane is not an essential prerequisite for cooperation, but rather acts as a facilitator of the latter by decreasing the costs of cooperation in the anarchic world, thus making cooperation on post-hegemonic world possible.<sup>397</sup> When he speaks of the prerequisites for hegemony, most of the factors mentioned have an unmistakable economic flavor, which is not surprising if one recalls the neo-liberal equation of wealth and power, as opposed to the neorealist connection between the military

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<sup>388</sup> Ibid..

<sup>389</sup> Baldwin, 1979.

<sup>390</sup> Ibid.

<sup>391</sup> Ibid.

<sup>392</sup> Keohane 1984

<sup>393</sup> It is not by chance that the part of the neo-liberalism inspired by Keohane and Nye is conventionally referred to as neo-institutionalism in IR theory.

<sup>394</sup> Keohane 1984, p.7

<sup>395</sup> Keohane 1984., p.5

<sup>396</sup> Ibid., pp.7-8

<sup>397</sup> Ibid., p.31

capabilities and power - among those mentioned we find control over a sufficient amount of raw materials, capital resources, global markets and possession of comparative advantage with regards to the production of primary goods.<sup>398</sup> Moreover, apart from the “economic control” part, Keohane includes the consensual character of hegemony as its essential component, namely as a consensually accepted order stemming from the economic interdependence and international regimes and complemented by the consensus among the ruling elites and the practice of exclusion of peripheral state on ideological grounds.<sup>399</sup>

In parallel with the introductory comment on the neo-liberal understanding of hegemony, it makes sense to recapitulate that for Keohane, international regimes coupled with varying states’ propensity for cooperation are of tremendous importance for the former view of hegemony.<sup>400</sup> The possibility of achieving higher payoffs and ultimate gain through collaboration and collective **action** mediated by international regimes is essential concerning the neoliberal conceptualization of hegemony. The former is a collectively accepted and respected set of norms, regulations, and behavioral expectations implemented either implicitly or explicitly – or put differently – frameworks for collective action elaborated for joint benefit maximization in a particular issue area. The latter benefit acts as the former’s primary “normative” foundation.<sup>401</sup> For Keohane, there for primary elements of which the international regimes are composed, namely principles, norms, rules, and decision-making procedures.<sup>402</sup> The first is related to the promulgation of the explicit goals the regime aims at achieving, while the second pertains to more abstract and less clear guiding ideas which have to be interpreted in an ad hoc manner depending on the context; the third is a further explication of the first concerning a specific situation, put differently it is a practical emanation of the regime’s promulgated principles. In contrast, the last, namely the decision-making procedures, pertains to the implementation of the principles mentioned above and rules guiding the existence of the international regime.<sup>403</sup>

International regimes serve not only to facilitate cooperation through the introduction of a mutually agreed and accepted degree of self-interest but also to increase the legitimacy of particular power distribution through shared principles, rules, norms, and decision-making procedures.<sup>404</sup> In this way, being in control of these regimes either in terms of “policing” the membership of the latter or being in charge of norms and principles formulation are the direct benchmarks of hegemony, whether issue-specific or global. Moreover, participation in and control of those regimes is one of the primary channels for ascendance to primacy for rising hegemons. Thus, for Keohane, hegemony is not about raw material power (read military) but rather about economic one, with the former being the outcome of the latter. The latter, moreover, is conceived outside of a mere aggregate indicative dimension but instead relates to the ability to establish an economic and political system that allows for the consensual dominance of a hegemon through the framework of institutional arrangements. Those arrangements are not value-free but deeply embedded in the hegemon’s view of right and wrong (whether in the organization of economy or politics) and thought of as a mechanism of maintaining the latter’s predominant position, either through membership policing or benefits distribution. In this way, we speak of hegemony as dominance exercised through the manipulation of material incentives, although in a kind of non-coercive (brute force) manner through institutional channels, and within various realms of international politics, as compared to the neo-realist perspective,

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<sup>398</sup> Ibid., p. 32

<sup>399</sup> Ibid., p.45

<sup>400</sup> Ibid, p51

<sup>401</sup> Ibid. p.57

<sup>402</sup> Ibid.

<sup>403</sup> Keohane 1984, p.58

<sup>404</sup> Ibid., pp.59-60

yet coercive in terms of costs (penalties, sanctions, etc.) imposed on those not wishing to adhere to the hegemonic order.

### 2.2.2. Soft Power

Now it makes sense to move to the concept which gave the neo-liberal strand of IR theory most of its fame among IR students and the general public, namely soft power. This concept deserves attention and consideration concerning the hegemony's conceptual problematic for two reasons: first, one might consider it as deserving attention due to the reformulation of the nature of power through the neo-liberal theoretical lenses, thus providing a different understanding of hegemony, mainly understood in conventional terms as the utmost power predominance; second, one might see soft power as a euphemism for the Gramscian hegemony, understood more as a form of rule/ order of non-coercive dominance, especially if we turn our attention to the fact, that the author of the concept, Joseph Nye explicitly acknowledged Gramsci among the inspiration sources for his understanding of what he calls soft power.<sup>405</sup>

Only in 2004 did the concept appear as the primary theoretical focus of Nye. Until then, soft power was mainly a conceptual instrument used to approach the analysis of the US foreign policy – he was mostly preoccupied with addressing the declinist theories that gained their moment in the mid-80s.<sup>406</sup> In particular, the latter stipulated that the US during the Cold War reached the “imperial overstretch,” steadily undermining the former's power and, as a result, its dominant position in the international system.<sup>407</sup> Nye criticized the latter literature for two primary reasons: first, any analysis of the material (military and economic) capabilities with its departure point being the post-War years would show a relative decline of the American power concerning other states due to the low-base bias (the losses experienced by other states compared to the US, inevitably put the latter in the position of the post-War primacy, and not accounting for the recovery potential of the former); second, the declinist literature mainly was preoccupied with what he calls “hard power” (material capabilities) and wholly neglected the more important element of the American power throughout the WWII and the post-War period, namely its “soft power.”<sup>408</sup> Put in the most general way, the latter for him is the ability one has to make others do what she wants, and different from the traditional account of hard power in the absence of a direct engagement between the actors and substituted by the mechanisms of ideational attraction and agenda setting thus making it connected to such immaterial phenomena like culture, ideology, and institutions.<sup>409</sup> And it is the exercise of this type of power that makes the American primacy a cheap good to buy since the ideational dominance in terms of the neo-liberal ideology allows for a less costly and more efficient American foreign-policy action, thus making the need for order maintenance through economic and military incentives unnecessary. Coupled with the natural fit between the ideology propagated by the US and the current reality of international politics, namely the complex interdependence where the former occupies a peculiar position of primacy, the United States is bound to lead, according to Nye.

While the inception of Nye's formulation of the concept was associated with criticizing the declinist literature, the subsequent full-blown elaboration of the idea, although in temporal terms seen as a logical outcome of the decade of theoretical work, turned out to be an argument against a new trend in the analysis of the American foreign policy – by the early 2000s two trends characterized it, namely isolationism and

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<sup>405</sup> Nye 2002, p. 9; 1990, p.32

<sup>406</sup> Nye 1990, 2002, 2004

<sup>407</sup> Kennedy, 1987

<sup>408</sup> Nye 1990, pp.31–5

<sup>409</sup> Ibid.

triumphalism, with the former becoming obsolete after the events of 9/11, and the latter becoming the only game in town afterward.<sup>410</sup> Triumphantist point of view revolved around two issues – the new transnational character of threats facing the US primacy and the latter's power preponderance in the international system. When the two become co-joined, it leads the former to conclude that the only way to fight those threats effectively is to downgrade the importance of the international institutions and international legitimacy of the US actions, thus making unilateral action aimed at preemptive and preventive moves necessary.<sup>411</sup> Nye's opposition to the triumphalist logic of action concerned their misunderstanding of the contemporary polarity of the system on par with the logic of soft power and transnationality, while in military terms, one might speak of the US preponderance, the international economic dimension is multipolar. At the same time, the transnational one is barely approached in terms of polarity – apart from the inability to use hard power to achieve desired results in the transnational dimension of the international, unilateral action undermines the legitimacy of the US, which in its turn, weakens the latter's soft power, the only type of power effective in the transnational dimension of the international.<sup>412</sup>

After drawing some historical context for the appearance of the concept of soft power, it makes sense to approach more closely the very formulation of the latter by Nye. As mentioned, Nye gives us a general definition of power: the ability to influence others' behavior, and subsequently, he moves to other aspects of understanding power in International Relations. As a result, it formulates the distinction between soft and hard types of power.<sup>413</sup> This distinction for him emanates from two analytical categories, namely the one of power behavior and tangibility of power resources.<sup>414</sup> The first refers to how actors exercise their power and ranges from command to co-optive. The former changes others' behavior through coercion and persuasion, while the latter shapes others' preferences through attraction and defining the overall political agenda. The second category of distinction is linked to the tangibility of power resources. However, Nye does not provide any clear elaboration of the tangibility category; he defines tangible and intangible power resources: the former is associated with material resources (territory, population, armed forces, etc.) and the latter with ideational/nonmaterial resources (ideology, culture, institutions, etc.).<sup>415</sup>

With this two-dimensional matrix, Nye can define the difference between hard and soft power by associating agents' type of power behavior with the power resources used – in particular, he links hard power resources with the command power behavior. In contrast, soft power resources are associated with the co-optive one.<sup>416</sup> In this sense, soft power appears to be co-optive power behavior plus intangible power resources. This conceptualization is problematic for several reasons, with the most important being the one acknowledged by Nye himself, namely that of the very relationship between power behavior and power resources – in particular, there are various historical examples showing way more diversity and neglecting his ties between the co-optive behavior and intangible power resources.<sup>417</sup> Yet he stipulates that overall the relationship holds, and outlier cases might be disregarded for the sake of his analysis.<sup>418</sup> This move makes the

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<sup>410</sup> Zahran and Ramos 2010, p. 15

<sup>411</sup> Ibid.

<sup>412</sup> Nye 2002, p.39

<sup>413</sup> Nye 1990, 25–9; 2002, 4–5; 2004, pp.1–5

<sup>414</sup> Ibid., p.267; Ibid., p.176; Ibid., p.7

<sup>415</sup> Ibid.

<sup>416</sup> Nye Jr 1990: 267, 2002: 176, 2004: 7

<sup>417</sup> Zahran and Ramos 2010, pp. 17-18

<sup>418</sup> Nye 2002, p.176

initial two-fold typology of power a mere single-term tautology for a conceptual couple of power behavior and resources.

Another aspect of Nye's conceptualization of soft power concerns the latter's sources and their relation to the hard power resources – for him, it is crystal clear that soft power does not depend on its hard alternative.<sup>419</sup> However, most of the examples he provides to support his claim seem to contradict his statement concerning the lack of dependence since almost each of the examples provided involves some hard power, however low and barely recognizable yet never absent.<sup>420</sup> Moreover, the denial of linkage with hard power raises another issue for the conceptualization of soft power linked to its sources, namely the issue of agents bearers and producers of soft power - if, in the case of hard power, it is easily identifiable with states, or particular individual agents acting within the framework established by states, the soft power agents are not operationalized with such ease. The trick here is that the sources of soft power defined by Nye, namely culture (its attractiveness to others), political values, and states' foreign policies (its legitimacy for others), are not susceptible to the same degree of control by the state as in the case of hard power.<sup>421</sup> This, in turn, is so because two out of the three are mainly produced within the civil society, and the state has only a mediated capability of influencing their production. In contrast, the civil society actors might strengthen or weaken the state's soft power with no actual reference to the desired outcome on the latter side.

In such a way, Nye's input into the hegemony problematic, apart from his work with Keohane on complex interdependence, is relatively straightforward and evident: it is the introduction of a non-material/ideational understanding of power, coupled with a non-coercive way of exercising power through attraction and agenda-setting. On par with his references, this coupling makes many commentators synonymize soft power with Gramsci's hegemony as the more "mainstreamized" conceptualization of the latter.<sup>422</sup> However, one must be cautious about such a comparison since it involves missing several vital points. First of all, Nye preserves the state-centric view of the international characteristic of the disciplinary mainstream (even in its neoliberal form with the latter's emphasis on transnational actors), thus associating soft power with state actors rather than with any societal or transnational actors (contrary to Gramsci and neo-Gramscians). In this sense, nothing much changes for hegemony since it is still conceived in terms of the utmost power predominance, with an ideational element being included and given more analytical importance.

Second, soft power for Nye is not only ideational but also purely consensual – the co-optive power behavior characteristic of soft power does not include any coercive element or preserves any linkage to commanding power behavior (coercion). At the same time, as was already mentioned in this work, the dialectics of the two, namely its co-dependence and co-constitutive character, are of paramount importance for Gramsci. Third, partially stems from the previous one, while speaking of soft power as acceptance of one's culture and ideas, it might resemble Gramsci's point regarding the conceptual dimension of hegemony. However, in Nye's interpretation, predominance in terms of soft power appears to be a monopolization (in terms of values, tastes, and preferences linked to those propagated by a hegemon) of non-material space by a leading state (an economic analogy characteristic of neo-realism is pretty evident here), though achieved in a voluntary character. While for Gramsci, hegemony, in its ideational dimension, is not a monopoly but rather a control of crucial elements and mechanisms of the intellectual space

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<sup>419</sup> Nye 2004, p.9

<sup>420</sup> Ibid.

<sup>421</sup> Ibid., p.11

<sup>422</sup> Hung Le 2016.

while allowing conflict so that the illusion of diversity is upheld (regulated market propagated as a perfect competition).

### 2.2.3. Socialization <sup>423</sup>

Another way of approaching hegemony within a neo-liberal perspective concerns the latter's heavier emphasis on domestic politics and ideational factors (compared to the neo-liberal strand), overlooked thus far by the present subchapter.<sup>424</sup> While preserving the mainstream focus on the material power of a hegemon, understood as the manipulation of threats and incentives, many neo-liberals pointed to another component of the hegemonic power. As a result, hegemony, namely the capacity to produce acquiescence without the usage of coercion – this component of the former operates on the level of substantial beliefs held by the political leaders of the secondary states and is actualized through the internalization of the hegemonic norms, and is ultimately the result of the socialization of the latter leaders.<sup>425</sup> The emphasis on the beliefs held by the political leaders allows for explaining not only the lower price a hegemon pays to maintain its primacy but also gives an idea of why the hegemonic order might outlive the hegemon itself.

Socialization, in this case, is understood as a “process of learning in which norms and ideals are transmitted from one party to another” – concerning the hegemony problematique, it is conceptualized “as the process through which national leaders internalize the norms and value orientations espoused by the hegemon and, as a consequence, become socialized into the community formed by the hegemon and other nations accepting its leadership position.”<sup>426</sup> Thus far, it is unclear what is so different concerning the concept of hegemonic socialization compared to previously mentioned issues, even within the neo-liberal theoretical strand. The point is that socialization opens up a different realm for understanding the mechanisms of the workings of hegemony since one thing is to say that a hegemon diffuses its values and worldviews in the international system it establishes. Quite another highlights the mechanisms, conditions, and actors of the latter diffusion. Three primary mechanisms allow socialization in international politics to occur: normative persuasion, external inducement, and international reconstruction.<sup>427</sup>

The first mechanism presupposes the absence of material inducements from the side of a hegemon, and compliance is reassured through direct contact with elites of the secondary states through channels of diplomatic, educational, and cultural exchanges, which subsequently lead to a steady internalization of the norms and values associated with the former.<sup>428</sup> The second pertains to some material incentives being employed (economic, diplomatic, or military) for opening up an opportunity for the norms diffusion to be later on legitimized and internalized by the elites – put differently, a hegemon needs to create specific conditions for the secondary state, so that the desired behavior, underpinned by some normative principles leads to the subsequent acceptance of the latter principles by the elites as having a normative value on its right.<sup>429</sup> This mechanism acquires its operability for three reasons: to deny external inducement domestically and avoid unnecessary political competition; the ruling elites have to claim their adherence to the values underpinning the desired policy action, which ultimately leads to their internalization; external pressure often leads to a reformulation and reassessment of one's

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<sup>423</sup> Although quite often this neo-liberal idea of hegemonic socialization is referred to as overlapping with the constructivist view of international politics, here the author thinks it necessary to include it into the neo-liberal section, not only by the sake of the conventional “theoretical” belonging of the authors but also by the very quality of the argument provided

<sup>424</sup> What is meant by the ideational factors concerns mostly ideas and worldviews held by individuals rather than abstractly conceived states, and/or norms and rules of international politics conceived as a non-material structure of the international.

<sup>425</sup> Ikenberry and Kupchan 1990, p.283

<sup>426</sup> Ibid.

<sup>427</sup> Ikenberry and Kupchan 1990, p. 290

<sup>428</sup> Ibid.

<sup>429</sup> Ibid., p.291

worldview, either as to bring to cohesion the policy action and the initially divergent beliefs, or to essentially critically reassess one's views; international institutions and organizations created by a hegemon, apart from introducing a coercive element also develop a system of social interactions that affects the secondary states elites' value frameworks through a permanent and intensive interaction within itself.<sup>430</sup> Finally, the third mechanism, namely internal reconstruction, presupposes a direct intervention into the secondary state from the side of a hegemon to bring the desired change in the socio-political organization of the former. This situation is possible in the direct aftermath of a tremendous historic-political change, be the latter a war or a revolution, and usually takes the form of an informal empire or colonial incorporation that introduces the hegemon's institutions and normative principles into the domestic realm of the secondary state so that with time passing the local elites conceive them as their own.<sup>431</sup>

The hegemonic socialization is conceived to be the most likely, effective, and long-lasting in cases of internal reconstruction, with the reasons for this being as follows: for socialization to occur successfully, the hegemon must have an apparent inclination to rebuild the international order, and elites in the secondary states must be receptive to the norms promoted by the former, the latter condition is most likely to be in place during the periods of a severe domestic socio-political turbulence.<sup>432</sup> With these conditions met, one can observe an outcome that produces non-coercive domination internationally, which ultimately rests in domestic legitimacy. On top of this, the priority in international socialization is given to the elites' socialization compared to the mass public socialization. Whatever the fit between the values held by the mass public elite, politics is the ultimate expression of the latter, thus making the elites embrace the norms propagated by the hegemon analytically of greater importance.<sup>433</sup> Moreover, international socialization works only and only in alignment with material power, making any purely ideational dynamics associated with norms of internalization obsolete: the secondary states' elites do not embrace those values for their moral and objective status. Instead, they hinge on them as a political tool, whether thought of in this way explicitly or more implicitly.<sup>434</sup>

Finally, even though previously it has been stated that the elites do not internalize the hegemonic values based on their intrinsic ideational qualities, nonetheless, there is a minimum normative acceptance margin concerning the latter: to be successfully adopted, those values should demonstrate at least some level of universal applicability and locate in relative proximity to the values held before by those elites.<sup>435</sup> Another reservation concerns the relational character of international socialization: although most of the analytical emphasis is put on the process of norms internalization by the elites of the secondary states, nonetheless, it appears to be more of a two-way process, yet within a limited range of cases – in particular, it concerns the reformulation of the propagated norms by the elites of the dominant state in case the latter are widely rejected; moreover, in specific instances, there might be even a degree of dialogue about the propagated norms between the dominant state's elites and those of the secondary states.<sup>436</sup> The last reservation deals with the ideational dynamics of the propagated norms: although ideas underpinning the hegemonic order are in no way "living beings," they nonetheless might lead to various normative and political outcomes depending on the variability of socio-economic contexts; in addition, the hegemon might find it difficult to follow the framework of rules

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<sup>430</sup> Ibid., p.291-292

<sup>431</sup> Ibid., p.292

<sup>432</sup> Ibid.,

<sup>433</sup> Ibid., p.293

<sup>434</sup> Ikenberry and Kupchan 1990, p.293

<sup>435</sup> Ibid.

<sup>436</sup> Ibid.

established, thus provoking a significant revision of the propagated normative framework by the secondary states' elites.<sup>437</sup>

Although this treatment of hegemonic orders, and by extension hegemony itself, is still based on the importance of material power predominance, it nevertheless provides an important and often missed perspective on the non-material mechanics of the former. The significance of this non-material component of hegemony, despite the lack of a decisive influence in defining the latter's nature, is dictated by the international outcomes that are otherwise non-explainable within the pure materialist conception of hegemony. Moreover, it allows us to break, at least to some extent, with the unitary view of international actors and points to a theoretical possibility for hegemonic agents and groups.

### 2.3. The English School: through recognition to an institution

The 'English School' is a label usually assigned to those IR scholars who shift the research focus from anarchy and power to one of international society. Hedley Bull, Martin Wight, Adam Watson, and John Vincent are conventionally regarded as the founding fathers of this perspective. At the same time, a more recent "name list" would include Tim Dunne, Robert Jackson, Barry Buzan, and Richard Little, among others.<sup>438</sup> By presenting an eclectic mix of assumptions found in Realism and Liberalism, it offers a *via media* between the two conflicting views; moreover, unlike the latter two, the ES attempts a holistic approach toward the subject of the international and does so through the conceptual triad of the international system, international society, and world society.<sup>439</sup>

Like Realism, the ES puts anarchy and the struggle for power at the center of its theoretical universe as concomitant with establishing the international system.<sup>440</sup> The latter, in its turn, refers to a situation when two or more political communities engage in intensive interaction to make their behavior mutually dependent.<sup>441</sup> However, contrary to realism, this is not the end of the story for the ES: at some moment, the interaction between the states reaches such a point when they start to share a common interest, which might be referred to as the "the fear of unrestricted violence."<sup>442</sup> This shared interest leads them to develop a set of standard rules to guide their interactions with the help of three broad rule complexes, namely those concerned with the fundamental principles of world politics<sup>443</sup>, the "rules of co-existence,"<sup>444</sup> and the "rules of cooperation."<sup>445</sup> And it is in this sense while preserving the realist emphasis on the state interest and its pursuance, the representatives of ES limit the former's scope, and marginal cost since the very existence of the norms mentioned above creates severe impediments for the unlimited pursuance of *raison d'état*.<sup>446</sup>

To put it differently, apart from the reason of the state, the ES speaks of a serious alternative to the reason of the system.<sup>447</sup> However, since most of these rules are not legally binding, and unlike in the domestic political organization, there is no higher authority to enforce them, it is more appropriate to speak of norms rather than rules.<sup>448</sup> Moreover, in the absence of the enforcing power, states undertake various functions associated with maintaining these norms - their collaboration in this process creates

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<sup>437</sup> Ibid., p.294.

<sup>438</sup> Linklater 2009, p.86.

<sup>439</sup> Ibid, pp.87-88.

<sup>440</sup> Buzan, 2004.

<sup>441</sup> Bull 1977, p.9.

<sup>442</sup> Bull 1977, p.64.

<sup>443</sup> Ibid, p.65.

<sup>444</sup> Ibid, p.66.

<sup>445</sup> Ibid, p. 67.

<sup>446</sup> Dunne 1995.

<sup>447</sup> Watson 1992, p.14.

<sup>448</sup> Brown 2009, pp.48-52.



international institutions such as war, diplomacy, the balance of power, international law, and sovereignty.<sup>449</sup> And when these institutions are in place, one might speak of the international society rather than the international system. The advent of the international society symbolizes a particular level of collaboration among the states characterized by a degree of permanence and practical ability to limit, yet only to some extent, the “egoistic behavior” dictated by the logic of anarchy and power politics.<sup>450</sup>

### 2.3.1. Recognition

For Hedley Bull, one of the most frequently mentioned founding fathers of the ES, the term hegemony does not play a central conceptual role in his writings; however, a couple of passages give us some idea of his view on hegemony – it appears to play a momentary role in a broader framework of assumptions. He approaches a general issue of inequality among the states and its consequences for international relations, which are essentially of a two-fold nature: first, the unequal power concentration among the states leads to a situation when the primary dynamics of the international system may be reduced to a mere interaction between the Great Powers; second, these interactions, apart from their intended outcomes bring about a general direction for the development of the international order.<sup>451</sup> Bull identifies three ways that contribute to the construction of the international order as brought by the interactions between the Great Powers and an additional three from the interaction between the former and the rest of the international society. And among the latter three, we find the one which invokes some conceptual role for hegemony. In particular, it comes about the unilateral exploitation of the local power predominance by the Great Powers.

This exercise of local predominance takes three forms: dominance, hegemony, and primacy – they are not distinct concepts located in different theoretical frameworks but instead form a conceptual continuum and reflect the changing degree of balance between coercion and consent.<sup>452</sup> The former implies the denial of political subjectivity to the weaker states, which means a habitual violation of the basic norms of international behavior such as sovereignty, equality, and independence. However, without falling into the explicit imperial incorporation, the latter, in its turn, is located on the opposite side of the continuum and is essentially equated with recognition. The recognition refers to the acknowledgment of more considerable burdens carried on by the predominant state in achieving common goals: it expresses itself as a situation of the disregard of the fundamental international rights by a dominant state, however, within the limits which are natural to the international realm, i.e., does not involve any use of coercive force and is characterized by a consensual agreement on the side of the weaker states.<sup>453</sup> Finally, hegemony is somewhere between the latter two and comprises both elements. Although it involves the resort to force and coercion, the latter does not acquire a chronic character and does not entail the essential denial of the international norms since the very violation of these norms is based on the acknowledgment of the latter offense and a justificatory reference to some overriding principle of the immediate necessity, not only formally, but practically as well.<sup>454</sup>

This approach to defining hegemony reveals its peculiarity compared to those found in previous perspectives. For example, while preserving the focus on the predominance of material power, characteristic of different strands of Realism, it posits the

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<sup>449</sup> Bull 1977, pp.68-71.

<sup>450</sup> *Ibid.*, p.71.

<sup>451</sup> *Ibid.*, p.200.

<sup>452</sup> *Ibid.*, p.207.

<sup>453</sup> *Ibid.*, p.208

<sup>454</sup> *Ibid.*, p.209

former within the framework of inequality among the states. Such a treatment of power disparities among the states shifts away from the structural focus on functional equality of the states, which makes hegemony a deviation from the logic of balancing to the one which conceives of it as one among several structural forms of this inequality. On top of this, it sees hegemony not as an outmost deviation, which is necessarily “balanced” by the international system, but rather as a more natural state of affairs within the international. Moreover, it perceives power inequality as not an enforcing but a constitutive factor of international politics.

Contrary to realists, with such a treatment of hegemony, it is not power and its utmost concentration *per se* which creates the hegemonic order, and more generally, the international one, but rather the interaction between a hegemon and its “subordinates.” Thus, with the normative factors playing an essential part in such an order, we move away from seeing a hegemonic order only as the institutionalization of long-term goals set by a hegemon to the notion of hegemony conceived in social than mere economic terms - this is possible due to the two-way recognition present within the hegemonic formula: it goes about the acknowledgment of prestige and occasional exclusive rights associated with a role of a hegemon and about rights and status held by the subordinates.<sup>455</sup> Finally, with this mechanism of recognition and prestige, hegemony loses its realist coercive flavor since if it is the only power that matters, hegemony can function through coercion. Thus, when relational and non-material elements are added, hegemony becomes a balanced relationship between coercion and consent. Although in such wording, it looks similar to the Gramscian hegemony, the similarity is a deceptive one: the latter refers to a societal order built on a tacit accommodation and neutralization of dissent, while in Bull’s formulation, hegemony is not conceived of as a specific political order, but rather a variation along the spectrum of coercion and consent.

Martin Wight is less explicit about his understanding of hegemony than Bull. However, the term occupies an essential standing in some of his works. In particular, in an attempt to distill the international’s historical essence, he asks whether the previous international systems were similar to the contemporary one, i.e., the European state system. He highlights two distinctive features of this system concerning its structure and dynamics.<sup>456</sup> The former refers to the Great Powers hierarchy, while the latter is associated with the succession of hegemonies. The Great power hierarchy brings in the institution of specific rights and responsibilities the dominant states are entitled to, thus paving the way for the ES’s focus on recognition as one of the primary mechanisms of the international realm. The succession of hegemonies, in turn, explains the necessity and functional content of the balance of power mechanism since each successive hegemony had its ultimate goal to abolish the international system through its complete unification.<sup>457</sup> In this sense, the very international system is defined as the opposite of the full-fledged hegemony; however, at the same time, the impending threat of a complete hegemony is a necessary condition for the very existence and functioning of the former. Keeping in mind that there is no substantial definition of hegemony given by Wight, apart from a cursory reference to power predominance, hegemony can be conceived as something alien if not wholly contrary to the very idea of the international society since the latter necessitates an equal distribution of power among its members.<sup>458</sup> In this sense, he deviates from Bull in injecting hegemony as a constitutive factor – while for Bull, hegemony and its influence on the formation of norms were direct and explicit, Wight makes it of a mediatory character as a “significant other” concerning the international society.

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<sup>455</sup> Ibid.

<sup>456</sup> Wight 1977, p.42.

<sup>457</sup> Ibid.

<sup>458</sup> Wight 1966, p.103.

Although considered by some commentators as a representative of ES who was the most interested in the term, Adam Watson essentially borrows much of the conceptual inspiration from Bull.<sup>459</sup> Despite his sheer coverage of different emanations of hegemony through recorded human history, and his ability to differentiate sublime specifics between the kinds of hegemonial authority exercised by Sumerians or Persians, still, the conceptual focus was the same, i.e., hegemony as a form of control in between empire (incorporation, coercion) and independence (sovereignty, consent).<sup>460</sup> The paradoxical auxiliary theoretical standing of hegemony is quite evident in those passages where Watson describes how the same political entity could exercise different forms of control within its political realm or zone of influence.<sup>461</sup> On another occasion, Watson speaks of hegemony more similar to the one found in Bull's writings; he mentions the term as one of the four types of control characteristic of the international systems, forming a continuum rather than a clear-cut and separate typology. This continuum is created by establishing two theoretical extremes between absolute independence and absolute empire, resulting in the four-fold typology of intra-systemic relationships: independence, hegemony, dominion, and empire.<sup>462</sup> The last one denotes a situation when the imperial center is fully controlling the rest of the communities within the system, while the first one refers to a system "inhabited" by communities that fully retain the ability for independent control over the issues of internal and external character – however, none of the two is conceivable in practice since the very involvement in relations with other communities imposes significant constraints on the freedom of action, be it the imperial center or the sovereign nation.<sup>463</sup> The dominion, in its turn, refers to a situation when the imperial center controls not only the external affairs of the state but is also able to influence some of the internal policies; however, the controlled state preserves the general autonomy over the internal issues, on par with formal external sovereignty.<sup>464</sup> Finally, hegemony is when a particular power, or a group of powers, can control the external relations of the states comprising the international system. This, in turn, is done by establishing a specific normative framework. These norms are established, on most occasions, through some coercion; however, they are not purely based on the latter since their establishment presumes a continual dialogue for accommodation between the hegemon and the other states.<sup>465</sup> Moreover, on par with hegemony, Watson speaks of suzerainty as the system where states accept some external overlordship as a legitimate one, contrary to the case of hegemony, where this acceptance is only implicit.<sup>466</sup>

### 2.3.2. Institution

Ian Clark's reading of the ES's "attitude" to hegemony runs opposite to the one found in the preceding paragraphs.<sup>467</sup> In his view, hegemony is not an auxiliary conceptual tool employed for theoretically elaborating the workings of the international but rather an ideal type that acts as the antipode of the conceptual foundations of the school.<sup>468</sup> In particular, it concerns the position hegemony holds concerning the concept of international society – the power predominance concurrent with the former threatens the international institutions associated with the stability of international society, namely the international law, war, and the balance of power, with the latter being the "constitution of international society."<sup>469</sup> In

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<sup>459</sup> Ibid.

<sup>460</sup> Watson 1992, pp.24-46.

<sup>461</sup> Ibid, p.37.

<sup>462</sup> Ibid.

<sup>463</sup> Ibid., pp.14,16.

<sup>464</sup> Ibid, p.15.

<sup>465</sup> Watson 2007, p.20.

<sup>466</sup> Ibid.

<sup>467</sup> Clark 2009,2011.

<sup>468</sup> Clark 2011.

<sup>469</sup> Dunne 1998, p.106; Alderson and Hurrell 1999, p.4; Vincent 1990, p.50 cited in Clark 2011, p.23

such a situation, the balance of power is substituted with the hierarchical order of hegemony, and one of the channels through which the international society is constituted, namely that of the former's interactions with the rest of the international system, becomes effectively obsolete, thus making the "societal" prospect of the international system vague.<sup>470</sup>

Nevertheless, he assumes that ES's body of theory contains a sufficient arsenal of theoretical assumptions to resolve the primary problem of hegemony, namely avoiding the downturns of power predominance while preserving the "fruits" of order.<sup>471</sup> He sees the institution of Great Powers, approached by Bull,<sup>472</sup> as a possible avenue for the theoretical analogy, namely the institution of hegemony. In particular, what is referred to is the preponderance enjoyed by the Great powers within the international system, which was normalized and institutionalized throughout the last centuries of human history, making it acquire sufficient legitimacy in the eyes of other members of the international system.<sup>473</sup> Clark acknowledges that hegemony as an institution of international society is not his theoretical innovation and credits Bruce Cronin for developing this idea, namely that hegemony is not a "personal" attribute of a country but rather a type of relationship within the international society.<sup>474</sup> However, he criticizes the latter for ultimately abandoning the sociological view of hegemony and putting too much emphasis on the material dimension of hegemony.

What is important here is that we distinguish between the balance of power and Great Power politics as a social institution about the relational foundations of the international society and the balance of power and hegemony as two instances of power distribution. This institutional perspective paves the way for a reasonable question Clark posits: Why can hegemony not acquire the same institutional setting as the Great Power politics?<sup>475</sup> In other words, if the balance of power serves the purpose of achieving the political results of conflict without the actual conflict taking place, why the same rationale cannot be applied to hegemony as the mechanism for reducing violence and bringing the necessary level of "sociality" to the international system.<sup>476</sup>

What we should keep in mind while speaking of hegemony as an institution is that we must avoid any domestic analogies with the respective transfer of political or functional authority but rather think of it as a mechanism created for the realization of common goals through the collaboration among the states, and the maintenance of the latter collaboration.<sup>477</sup> Moreover, we should remember that international institutions are not given and immutable, they have a particular historical genealogy, and they rise and fall accordingly – this point is crucial since it theoretically allows for establishing hegemony as an institution.<sup>478</sup> Moreover, as Clark points out, Wight's argument of the fit between the institutions and the character and state of the international society itself is a clear "green light" for introducing hegemony as an international institution.<sup>479</sup> Also, while talking about hegemony as an institution, we should pay attention to the typological hierarchy of institutions elaborated by the ES, namely the one summarized by Buzan, and based on the primary vs. secondary and master vs. derivative formal oppositions – within this nested taxonomy hegemony turns out to be a derivative of the balance of power or the great-

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<sup>470</sup> Clark 2009

<sup>471</sup> Clark 2009, p.213

<sup>472</sup> Bull 1971, p.148

<sup>473</sup> Alderson and Hurrell 1999, p.24

<sup>474</sup> Cronin, 2001, pp.107-108.

<sup>475</sup> Bull 1977, p.44

<sup>476</sup> Bull 1966, p.45

<sup>477</sup> Bull 1977, p.74

<sup>478</sup> Buzan 2004, pp.169, 172

<sup>479</sup> Wight 1979, p. 111

power management, but at the same time a primary institution.<sup>480</sup> With this in mind, Clark warns us not to conflate hegemony and various secondary institutions it might entail so that we are not lost in a detailed specification of the structure of hegemony as an institution.<sup>481</sup>

Subsequently, he provides us with his typology of hegemonic forms, an attempt to leave the attributive and power-focused understanding of hegemony. Consequently, institutional forms hegemony takes and entails – this typology is built around the social reception, context, and scope of acceptance.<sup>482</sup> He works with two sets of distinctions: the composition of the hegemon and the scope of the societal constituency. The latter hegemon requires legitimation.<sup>483</sup> The former yields the spectrum of ideal types from singular to collective hegemony, while the latter ranges from exclusive to inclusive, meaning appealing to the whole of international society or just to a group of states.<sup>484</sup> With this model, Clark demonstrates that there is no universal model of hegemony that suits all the historical cases; instead, he elaborates on the framework based not only on the composition of the hegemon but also on the social context of the latter's legitimacy: in this case, the Concert of Europe appears to be a collective, inclusive hegemony, the British Empire as a singular hegemony, and the American primacy as a coalitional one.<sup>485</sup>

#### 2.4. Neo-Gramscianism: social and transnational forces, intellectuals

For the first time throughout the subchapter, we come to the theoretical tradition that makes hegemony a conceptual cornerstone of its view of the international, and this tradition is conventionally referred to as neo-Gramscianism. Although Robert Cox resisted such labeling, it took root in the mainstream set of theoretical coordinates, leaving aside the '*Italian School*' label preferred by Stephen Gill, another foundational author concerning the birth of the tradition.<sup>486</sup>

As one might guess from its name, the tradition's novelty about theorizing the international lies in the fact of applying a significant portion of the Gramscian heritage found within the Prison Notebooks; however, this is not the whole story since such treatment of its theoretical basis might lead to a significant oversimplification. The problem is that the neo-Gramscian perspective is not just an IR approach to the international but something that can be termed a *critical theory*. Thus it finds itself in a more vigorous opposition to other theoretical strands within the main body of the discipline and the basis of this opposition stems from several methodological premises contained within neo-Gramscianism: first, contrary to the mainstream theories it refuses to accept the given character of the socio-political reality and questions the very genesis and possible alternatives to the latter; second, as any critical theory it aims at grasping the totality of socio-political relations, rather than ultimately limiting itself to a narrow cross-section of the latter, be it just economy, politics, or culture; third, its focus on the genesis of the existing socio-political order, and the resulting preoccupation with historicizing the latter, stems from its ultimate desire to *understand* the social change, rather than predict or explain it; finally, it questions the very impartiality of other perspectives by highlighting their connection with the existing socio-political order, thus pointing to the limited potential of these perspective to guide positive social change.<sup>487</sup>

Eventually, if one wonders about the substantial theoretical difference between neo-Gramscianism and other IR perspectives, the answer is oddly self-evident and, at the same

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<sup>480</sup> Buzan 2004, p.167, pp.182-187, p.184 cited in Clark 2011, p.58.

<sup>481</sup> Clark 2011, p.59.

<sup>482</sup> Ibid.

<sup>483</sup> Ibid., p.60.

<sup>484</sup> Ibid.

<sup>485</sup> Ibid.

<sup>486</sup> Ives & Short, 2013.

<sup>487</sup> Cox 1987

time, not easily communicated. In the most general terms, this perspective refuses a unidimensional and isolated treatment of the international realm: it locates the driving force of the international dynamics not within the systemic distribution of power, global economic cooperation, or the institutional frameworks created by the Great Powers, but rather within a set of specific societal relations, although in particular forms and on respective scales, present on all levels of the socio-political reality, namely the production relations.<sup>488</sup> These relations not only contain specific power frameworks within themselves but constitute and reproduce them on a larger societal and political scale, domestic or global. However, this is not a one-way logic since the former is also affected by the power frameworks brought into existence by themselves, either in the form of acquisition or opposition to the latter. Thus, the state, in its domestic emanation, namely the state-society complex, is the only institutional expression of the dominant form of production relations, serving the interests of the social group, which possesses a dominant position within the latter relations.<sup>489</sup>

By extension, with this logic, we do not speak of the international system primarily as “populated” with rational and abstract security (power) or cooperation-seeking actors, but rather numerous state-society complexes, which, apart from playing the power politics “game,” seek to advance the interests of its dominant strata through projecting externally the same framework of production relations as the one which is established domestically.<sup>490</sup> Moreover, most of this “projection” takes place not through the conventional channels of the Great Power politics or the institutional framework associated with the latter but through the trans-societal interactions within economic, social, and cultural spheres. In this sense, the international understood in conventional terms becomes only an aspect of the global world order, defined by the globally dominant relations of production. And it is in this sense that the international becomes a peculiar realm, since apart from the conventionally mentioned states, international organizations and institutions, the primary operating forces and actors of this realm, become transnational.

#### 2.4.1. The Coxian Gramsci

In *Gramsci, hegemony, and international relations*, Cox presented the reader with his interpretation of Gramsci’s *Prison Notebooks* and possible avenues for the conceptual transfer towards the realm of IR.<sup>491492</sup> Like the conventional view, he highlights a two-fold lineage of Gramsci’s hegemony: one related to Lenin and the Third International, and another to Machiavelli; yet at the same time pointing to a theoretical twist done by Gramsci, namely the reversal of hegemony’s application from the case of the proletariat, to that of the bourgeoisie.<sup>493</sup> In particular, it concerns Gramsci’s conceptual path, which led the latter from bourgeois hegemony as bending around the State’s apparatuses of coercion, to the extended interpretation of the State – in other words, since there are non-coercive underpinnings of the political order found in civil society, there is no real meaning in limiting the notion of the State to its narrow sense (elements of government).<sup>494</sup> He explicitly emphasizes the decisive importance of Machiavelli’s metaphor of power as a centaur for Gramsci’s concept of hegemony, on par with the latter’s analogy of the revolutionary party and Machiavelli’s Prince.<sup>495</sup>

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<sup>488</sup> Ibid., p.12

<sup>489</sup> Ibid., p.205

<sup>490</sup> Ibid.

<sup>491</sup> Cox 1983, p.124

<sup>492</sup> Although this is beyond the scope of this essay, Cox’s reference (1983, p.125) to Perry Anderson’s *Antinomies of Antonio Gramsci* (1976), is itself quite an illustrative of a superficial reading of the text coupled with its decontextualization.

<sup>493</sup> Ibid., p.125.

<sup>494</sup> Ibid., pp.125-126.

<sup>495</sup> Ibid., pp.126-127.

The first of the Gramscian concepts associated with hegemony and used by Cox is civil society, or to be more precise, civil society in its relation to the State. The latter is related to the domain free of force usage and based on consensual association as its primary operational principle. The type of relation between the two is a defining feature of a particular social formation's stability.<sup>496</sup> Another concept addressed by Cox is the *passive revolution*, which is used to denote a process opposite to hegemony, or better to say, the process which is taking place when hegemony is not possible: where bourgeoisie domination is a result of the specific internal socio-political transformation and the resulting power hierarchy is popularly accepted, one might speak of hegemony; when the bourgeoisie was not able to achieve a hegemonic position due to its inability of ensuring popular support for the promoted societal order, passive revolution is taking place.<sup>497</sup> This latter case is usually a result of a "transformative import" or "external imposition" of a new societal order, which leads to the abovementioned lack of popular support since the enacted transformation does not have its roots in the domestic socio-political context.<sup>498</sup>

The term denotes "a dialectic of revolution vs. restoration," leading to a stalemate between the traditional dominant class and the ascending one. In such a way, passive revolution appears to be, in some sense, the opposite of hegemony since the stalemate is not resolvable within the current socio-political context. It necessitates alternative ways and mechanisms for securing the dominant's class superior position compared to the case when there is sufficient popular support for the promoted power hierarchy. The latter need for the roundabout paths conditions the presence of two phenomena, *Caesarism* and *transformismo*. The former refers to a situation when a strongman temporarily enters the societal "scene" to resolve the stalemate; depending on his specific actions, it can be progressive or reactionary.<sup>499</sup> The latter, in its turn, appears to be of a two-fold nature: from one point of view, it concerns attempts at building a broad societal coalition through including subaltern classes' leaders and interests, while from another point of view, it might be seen as a process of "taming" opposing ideas which might be dangerous for the ruling coalition, though adjusting them to the latter's policies.<sup>500</sup>

Yet another of Gramsci's concepts Cox attends to is the historic block.<sup>501</sup> For Cox, the notion of the historic block reflects a dialectical unity of structure and superstructure, which allows Gramsci to escape any form of reductionism.<sup>502</sup> However, the former cannot exist without a hegemonic class being present since its unity is ensured by the latter through the channels available to it within the extended State model and mediated by the propagation of a common culture.<sup>503</sup> Yet this function of maintaining the coherence of a historic block is not performed directly by the dominant class; instead, it is performed by a specific social group associated with the latter, although not being a part of it explicitly, which "perform[s] the function of developing and sustaining the mental images, technologies, and organizations which bind together the members of a class and a historic bloc into a common identity."<sup>504</sup> On top of this, it is not only the dominant class that has such an "auxiliary" social group but any class, be it hegemonic or not. Gramsci termed this group the intellectuals, and what is of crucial importance in Cox's reading of Gramsci is that he preserves the functional rather than the qualitative basis of the intellectuals'

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<sup>496</sup> Ibid., pp.127-128.

<sup>497</sup> Ibid., p.128.

<sup>498</sup> Ibid., p.129.

<sup>499</sup> Cox 1983, p.129.

<sup>500</sup> Ibid., p.130.

<sup>501</sup> As many other commentators, he elaborates on the concept's roots in Sorel's thought, and a kind of transformation it has gone through in Gramsci's writings.

<sup>502</sup> The reading of Gramsci which leads to such a claim is highly debatable and has been addressed by the Italian school critics: see, for example, Germain and Kenny (1983).

<sup>503</sup> Cox 1983, p. 132

<sup>504</sup> Ibid.

conceptualization. Put differently, the basis for speaking of the intellectuals as a distinct social group is their functional relation to hegemony or creation and maintenance of specific ideational “maps” circulating within a society rather than a simple distinction between the intellectual and manual labor implied by the name itself.

Thus far, it is clear that the conceptual framework associated with hegemony is not limited to a simple opposition of coercion and consent. In other words, one cannot deprive Gramscian hegemony of its auxiliary conceptual apparatus and apply it as being taken from a theoretical vacuum. Since, in this case, we risk arriving at a conceptualization that has much more in common with the concept of soft power rather than following the path well-trodden by Gramsci. Nye’s soft power is understood chiefly in terms of attraction and imitation<sup>505</sup> as the opposite of hard power. At the same time, hegemony, in some sense, rejects the opposition of coercion and consent altogether, namely that neither is ultimately prevalent and the former itself is a theoretical reflection of their dialectical unity. Putting aside the difference between soft power and hegemony, even this quite limited and selective reading of Gramsci by Cox shows that differential social locations, actors, and outcomes are linked with hegemonic power dynamics.

Before approaching the primary issue, namely the one of hegemony’s application to the IR’s problematique, he points to several conventional usages of the term within the field: the one associated with imperialism and another linked to the situation of domination of one country over others, and he contrasts the latter two with the Gramscian understanding of the term, and, for the sake of conceptual clarity, labels them as “domination.”<sup>506</sup> Following a historical excursus into the succession of recent hegemonic and non-hegemonic world orders, Cox concludes that the hegemonic world order is not based on coercive exploitation, but rather the one which is “universal in conception,” i.e., addressing and being compatible with interests of other states.<sup>507</sup> This kind of world order is impossible to comprehend if one focuses on inter-state relations since its foundation lies in extending civil society to the global realm and creating links between dominant classes in various national settings.<sup>508</sup> Thus, in its essence, hegemony can be conceived as a phenomenon of the international which is characterized by four interrelated characteristics; namely, it is domestic (societal) in its origin, multidimensional in terms of its structure, heterogeneous in its geographical expression, and transnational.

Its domestic character stems from the fact that hegemony, or hegemonic world order, is usually an external projection of the socioeconomic transformation which had taken place in a particular society characterized by a set of specific conditions. Subsequently, the material and superstructural elements associated with the latter transformation become an emulation model for other societies. As Cox puts it, “the international” hegemony is ‘in its beginnings an outward expansion of the internal (national) hegemony established by a dominant social class.’<sup>509</sup> Put differently, hegemony’s basis is not the state’s ability to project its capabilities, conceived in terms of economic or military strength (hard power), or an ability to attract and co-opt with the help of culture and institutions (soft power): all of these are just “accompanying indicators,” which make sense concerning hegemony if approached dialectically. Instead, the basis of hegemony is the viable and sufficiently realized socio-economic transformation within a specific

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<sup>505</sup> While the immediate comment on the difference between soft power and hegemony relates to their connection with the opposition of consensual and coercive dimensions of power, the deeper difference stems from a slightly different point. Despite the label of “neoliberalism” commonly attributed to Nye’s analysis of power, it is still loyal to the IR’s state-centric framework of analysis. Gramsci, in his turn, worked within the framework of the sociological analysis of power, which a priori presupposes a different ontology of the object of study

<sup>506</sup> Cox 1983 p.135

<sup>507</sup> Ibid., p.136

<sup>508</sup> Ibid., p.136

<sup>509</sup> Ibid., p. 137



domestic setting, which at one point “starts” its expansion through coercive inculcation or consensual emulation.

When one touches on the issue of hegemony’s multidimensional structure, we approach the primary conceptual innovation introduced by Cox, at least regarding the realm of IR theory. Contrary to most of his contemporaries, he argued that hegemony is not simply a world order, a simple power configuration on an international level, but rather a multidimensional international phenomenon. In economic terms, it is a primary mode of production operating within the global economy, which links diverse modes of production across the globe. In societal terms, hegemony reflects the fact of geographically diverse dominant classes being transnationally connected. Finally, ideationally hegemony unfolds as a set of institutions and acceptable modes of behavior for states and transnational forces maintaining the former’s stability and coherence. Thus, we can speak of hegemony as a structural phenomenon expressed politically, economically, socially, and ideationally. Moreover, it is impossible to talk about hegemony in only one of its structural dimensions isolated from others since only the integrated view of the latter allows one to comprehend its dynamics fully.

Moreover, this multidimensional nature of hegemony, according to Cox, affects the way the latter is “observed” internationally or, in other words, expresses its geographical heterogeneity. The point here is that the socioeconomic and political “reality” of other societies differs from the one which produced the internationally hegemonic state; thus, a thorough and identical transfer and emulation of the initial transformation is not possible due to various reasons. In particular, it is the fact that the initial socio-political context of those societies is different from the one where the transformation initially took place, meaning that their old internal patterns of power relations are not prone to a smooth transformation.<sup>510</sup> This, in turn, leads to a “selective emulation” on the latter’s side. Specifically, Cox points to the fact that those societies are eager to adopt economic or ideational patterns of the hegemonic model but cannot fully transfer its political framework. Thus, this partial transformation, or better to say, attempts at emulation, take the form of *passive revolution* described earlier, meaning that internationally hegemony’s heterogeneous geography is a euphemism for passive revolution.<sup>511</sup> In such a way, he claims a heterogenous “geography” of hegemony, namely that it is not equally “spread” across the international system and the respective national societies. The most robust and most visible characteristics of hegemony are found in the “core” society, or other words, the society where the socio-economic change took place initially and had transformed the dominant mode of production and a socio-political organization entirely, while within the “periphery” hegemony becomes less similar to its “core” version as a result of the clash with local modes of production and socio-political organization. It is the latter kind of society’s hegemony that expresses its contradictions and is most vulnerable to counter-hegemonic action.<sup>512</sup>

Finally, the nexus of hegemony’s domestic roots and its multidimensional and geographically heterogeneous character make explicitly visible its fourth specific characteristic, namely its transnationality. The aforementioned domestic transformation establishes a social formation that solidifies a specific power hierarchy with a particular group at the top. When “exported” abroad, it addresses certain groups of similar “social standing” within a foreign society.<sup>513</sup> Hence, the initial “connection” is not between the societies per se but the social groups aiming at the dominant position within the new social order. Subsequently, when the transformation gains its “critical mass” internationally,

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<sup>510</sup> Cox 1983, p.137

<sup>511</sup> Ibid.

<sup>512</sup> Ibid.

<sup>513</sup> Ibid., p.138

namely the number of societies (states) accepting the same social order is sufficient quantitatively and qualitatively to speak of hegemonic international order, its multidimensionality comes into play.

#### 2.4.2. The Amsterdam School

The Coxian attempt to tame Gramsci had its subsequent effect on the Amsterdam school (project)<sup>514</sup>, which is quite often referred to as part of the so-called neo-Gramscianism in IR: even before the Gramscian turn inspired by Cox, their research program was characterized by a heavy focus on the issue of transnational relations within the limits of international political economy and based on a historical-materialist perspective.<sup>515</sup> Their primary difference from other approaches claiming the transnational dimension was their denial of the primary role of the non-State actors such as TNCs and NGOs, with this place being given to transnational social forces, i.e., transnational classes. The Amsterdam school's linkage to Cox and neo-Gramscianism, in general, is found in the critical point of conjuncture, namely the Coxian conceptualization of global civil society and state-society complex, which became "key point of departure for the re-theorization of transnational class formation."<sup>516</sup> For the Amsterdam school, this conceptualization is the core of their research program: international politics is the realm of social forces rather than states as independent and self-sufficient actors.<sup>517</sup>

Thus, there is no surprise that hegemony acquires different semantics and realm of application. Namely, it is associated with transnational social forces (classes), not states; within the Amsterdam school's research problematique, it ceases to denote the relationship between states but points to the instance/process of class rule.<sup>518</sup> Although a superficial reading of the Amsterdam school may imply high levels of similarity with the Coxian approach, there are significant differences. First, and ironically, for the Amsterdam school, it is not Gramsci as the conceptual root source for their understanding of hegemony, but Jurgen Habermas – borrowing from the latter Van der Pijl introduces the notion of external and internal socialization, with the former associated with the material transformation of the external reality, and the latter linked to the process of ideational change of one's world view mediated by the normative structures used to shape, necessitate and legitimize specific needs and actions.<sup>519</sup> An essential part of the bid for social hegemony is the so-called "concepts of control," abstract ideational and practical frameworks linked to a specific worldview of a particular class adjusted and applied to the whole societal horizon.<sup>520</sup>

Second, although Van der Pijl follows Cox in distinguishing two types of social formations, namely "Lockean" and "Hobbesian," the way he employs them differs significantly from the latter. The Hobbesian state type pertains to "strong" states guiding and enforcing a particular type of social transformation. In contrast, the Lockean type implies a sufficient level of socialization in the Habermasian internal sense, thus leading to the self-regulating character of social dynamics with state interventions reserved only for the urgent instances of the utmost social conflict and disbalance.<sup>521</sup> The form of the rule, characteristic of the latter type of states, is hegemonic since, according to Cox, it is based on consent, with coercion only lurking behind and preserved for the critical moments;

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<sup>514</sup> The Amsterdam school is understood here as the research group working at the University of Amsterdam with its most prominent representatives being Kees Van der Pijl, Hank Overbeek, and Bastiaan Van Appeldorn.

<sup>515</sup> Van der Pijl, 1989, p. 11.

<sup>516</sup> Overbeek & Van der Pijl, 1993.

<sup>517</sup> Ibid.

<sup>518</sup> Van der Pijl, 1998.

<sup>519</sup> Ibid.

<sup>520</sup> Van der Pijl, 2006, p. 31.

<sup>521</sup> Van der Pijl, 1989, p. 19;

however, Van der Pijl disagrees with such a formulation in several essential respects.<sup>522</sup> As was mentioned above, “socialization” and “concepts of control” are genuinely “social” notions that are neither structurally nor conceptually applicable to nation-states as such. The two are essentially transnational, and the situational overlap of the normative structures the two reflect/maintain with the territoriality, or institutional framework of nation-states does not speak in favor of their conceptual equality.<sup>523</sup> Thus, for the Amsterdam school, it makes more sense to talk of the “Lockean heartland”<sup>524</sup> rather than individual states, with only a limited degree of importance concerning the processes of socialization, which is, while being a transnational one is defined by the movement of capital across the borders of nation-states.<sup>525</sup>

Third, following the transnational rationale, the Gramscian and Coxian category of “historic bloc” is “transnationalized” as well, thus pointing to the transnational character of hegemonic structures and superstructures. In this case, the struggle for hegemony (i.e., the elaboration and imposition of concepts of control) is taking place on a transnational level and among transnational social forces (i.e., classes) within the realm of the transnational civil society, namely various corporate interlocks, and channels of elite socialization (namely forums, planning and expert groups, etc.).<sup>526</sup> It is precisely the level and realm where the concepts of control are formulated, elaborated, and disseminated. It is precisely the arena where the conflict and competition of these concepts occur.<sup>527</sup> However, contrary to the Coxian view, the competing concepts of control do not belong to the unified and homogenous transnational ruling class but instead represent bids for hegemony from various conflicting fractions of the latter, expressed in their general inclination to assert themselves on the nation-state level, within and outside of the Lockean heartland effectively making international relations the realm of the “global domestic politics.”<sup>528</sup>

Fourth, in avoiding the Kautskian notion of “ultra-imperialism” characteristic of the Coxian view of hegemony as representing the concept of control of a single class, the Amsterdam school pointed to the struggle between various factions of the transnational capitalist class rather than between capitalist states.<sup>529</sup> This heterogeneity is explained by the peculiarities of the class-formation process of the former, which in their turn are defined by a two-fold positional relation of the transnational capitalist class, namely by its position vis-à-vis the proletariat and the functional differentiation in the process of capital circulation (e.g., financial, industrial capital, etc.).<sup>530</sup> Finally, the representatives of the Amsterdam school paid particular attention to their version of the transnational “political society” as a parallel structure to the afore-described transnational “civil society,” which they referred to as “quasi-state structures.”<sup>531</sup>

The neo-Gramscian perspective, or the Italian school as referred to by some commentators, presents a critical case concerning hegemony and its usage within the theoretical landscape of IR. By drawing on Gramsci, the Italian school was able to revitalize the dualistic nature of the concept characteristic of the Ancient Greek usage and shift the semantic emphasis from mere material power as the basis of the former concept, on par with creating a clear conceptual buffer zone between the Gramscian hegemony, and the neo-liberal attempts to account for the non-material aspects of power. If Cox

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<sup>522</sup> Ibid.

<sup>523</sup> Ibid.

<sup>524</sup> Van der Pijl, 1998 pp. 65–79.

<sup>525</sup> Ibid.

<sup>526</sup> Van der Pijl, 2006, pp.12–17.

<sup>527</sup> Moreover, it is exactly the realm where the “managerial” group linked to the ruling class is formed, entitled with the tasks of elaborating and disseminating the respective concepts of control, thus functionally making to identical to the Gramscian intellectuals.

<sup>528</sup> Van der Pijl, 2006, pp. 12–17

<sup>529</sup> Ibid.

<sup>530</sup> Ibid.

<sup>531</sup> Montalbano 2022.

emphasized the material structure of hegemony, following a more classical Marxist line, the Amsterdam school could counter-balance this move with its focus on ideational structures.

Moreover, Cox and his neo-Gramscian successors brought into the vocabulary and adapted to the needs of IR theory various Gramscian concepts associated with hegemony, which played a role in accounting for genealogy, dynamics, and variability of hegemony in the writings of Antonio Gramsci. Among these concepts, one should mention intellectuals as the functional-agential expression of hegemony and passive revolution as the way to account for the variability of paths to and spatial heterogeneity of hegemony, on par with reformismo and Caesarism. Overall, bringing intellectuals into the theoretical scene of IR might be the most important advance of the Italian school since it transforms our understanding of the functional role of various seemingly.

The Amsterdam school is essential for our understanding of hegemony due to its emphasis on the heterogeneity of the dominant class. The internal struggles of the fractions it is composed of – in this case, hegemony is the outcome of this conflict transplanted to the broader societal plain and adjusted for the interests of the larger society; moreover, their view of international relations as the globalized domestic politics is another heuristically helpful tool for analyzing instances of consensual orders of domination due to its ability to appease the oppositional pair of local vs. global.

#### In conclusion

Although three out of four IR theoretical perspectives considered appear to be state-centric and mostly hinging on the material understanding of the driving factors of international politics, nonetheless, even this set of perspectives allows us to see that hegemony is not “over” with the mere material power predominance, or ideational unity and homogeneity. In this respect, the case of realism, and ironically in its structural version, allows us to see that hegemony, apart from the power predominance (in this case, material one), rests mainly on the international public goods provision. Whether the hegemon can tax other states for this process or the process is less guided and susceptible to the hegemonic “supervision” is a point of debate among the various strands and sub-strands within the HST theory (including its neo-liberal version). However, the fact is clear, without the international public goods provision, we cannot speak of hegemony, only of the mere power predominance understood in structural-systemic terms or more in the fashion of the balance of power logic.

The neo-liberal strand of IR theory, apart from similarly pointing to the material basis of hegemony, shifts away from the realist perspective in two significant respects. First, it points to the fact that although material predominance is necessary for any hegemonic order to be in place, it is not easily transformed and rechanneled across the various international domains. Put otherwise, if someone has the largest military in the world, it does not necessarily mean that she would be able to use it adequately and effectively to receive a desirable outcome from the UN General Assembly vote on the issue of animal rights. In this respect, hegemony appears to be the predominance over and with specific issue areas of international politics, expressed either as membership policing or the substantive normative control of the latter issue areas, collectively organized in the form of international regimes. Moreover, the neo-liberal perspective allows us to see that in between the conventional conceptual couples of power base and power types in their material and non-material emanations, usually associated with dominance and hegemony, one can find an additional element, which might be labeled as power mode, or power behavior. In this sense, one might use the ideational power resources to achieve one’s ends of consensual compliance, however, in coercive ways, which are not conventionally

associated with the non-coercive forms of power. Thus, we might have non-material power resources from one side of the conceptual equation and consensual compliance from another, with this situation usually labeled as hegemony; however, the latter result is achieved through an additional equational element of coercive behavior, making the abovementioned equation problematic. Finally, neo-liberals also paid attention to the ideational dimension of dominance, neglected mainly by the structural realists and non-clearly elaborated by those of the classical kind, namely the issue of hegemonic socialization. Essentially, it points to the fact that the mere interaction between the potential hegemon, and those secondary states, might bring the result of consensual acceptance of the norms propagated by the hegemon, without any use of material power or at least the threat of its usage, being in place.

The ES perspective, in its turn, while remaining within the power-oriented and state-centric view of the international, pushes the social element already present in the neo-liberal strand to a new level. In particular, it conceives hegemony as stemming from the power predominance, i.e., power inequality; however, the very same inequality acquires a specific relational flavor, namely that it appears to be a framework of recognized roles and statuses seen by those who participate in this unequal relation. With time, it loses its initial root in power inequality and appears to be normative, not about any of the features of the actors possessing specific status roles. The latter point pertains more to the recent attempts of some of the ES's representatives to build an institutional theory of hegemony, where the latter becomes a kind of international social institution aimed at governing the relations between the members of the international system when the excessive power disparity is in place.

Finally, when we return to the neo-Gramscian perspective, we, to some extent, leave the state-centric and materially oriented framework of speaking about hegemony. First, hegemony is seen as a social phenomenon only acquiring its international dimension due to its origins in a specific domestic social formation. Second, it appears to be a process in development in two respects, namely that we speak of the global extension of the abovementioned domestic transformation and the following transformation into the global order exceeding even the very notion of international. Third, we move away from the state-centric view of hegemony to the one focused on social forces and social groups, making hegemony a structural expression of their activities, thus switching to the transnational perspective of thinking about the problematique of domination. And finally, we stop speaking of hegemony as a monolithic phenomenon in several respects, namely that the dominant state, group, and class appear to be composed of various conflicting fractions and that the hegemonic order is not characterized by structural and substantial homogeneity since the differential levels of social economic and political processes across this order presuppose a high level of individual variability among the participants of this order, whether conceived in terms of their geographical and nation-state origin or combined with those of social status and civilizational perspectives. Moreover, we can now speak of the hegemonic agents in the form of Gramscian intellectuals operating within and with the help of the global civil society, thus moving even further away from a mere structural and automatic logic of power predominance.

Overall, similar to the previous chapter, this one demonstrated to us one more time that hegemony is barely narrowed to mere consensual domination. Even within the parental discipline, which is not the ideal role model for thinking and theorizing the issue of dominance, there is plenty to be thought of and transferred to the realm of disciplinary sociology. Although the latter transfer seems to be more fruitful and effective in case one turns to the "professional" sub-disciplines dealing with the questions of disciplinary organization and knowledge production, the fact that IR scholars seem to be resistant to

critical transfers from other fields makes the analogy from the parental discipline a good move – at least concerning starting the dialogue regarding the disciplinary sociology’s refusal to think of its parental discipline in terms different from the latter’s way of thinking about its subject matter. This move, although a long and, to some extent, bland one, is still necessary since it allows uncovering those patterns of thinking about the discipline that are self-evident and require critical reconsideration. They have to be reapproached, destabilized, and reconceptualized.

## Chapter 3. Hegemony and Sociology of IR

### Introduction

The purpose of this subchapter is of a two-fold nature: first is the substantial one, and it aims at introducing the author's vision of conceptual avenues available for the improvement of the current understanding of hegemony within the sub-field of the disciplinary sociology; moreover, it attempts to fulfill the promise voiced at the beginning of this work – the one of advancing the subfield through a “reversed” logic of working with its problematique. To reiterate, the author sees the current state of affairs in the sociology of IR as best described with the word “stalemate” due to the lack of conceptual and empirical novelty concerning the study of disciplinary dynamics. Although the number of works published, roundtables, and conference panels convened is relatively high, the general conceptual line about “dominance” and “hegemony” remains surprisingly the same: it is always about Gramsci, distribution of topics, issues, areas, theories, institutions, and difference, with hegemony being defined not on its own “terms,” but concerning those mentioned above.<sup>532</sup> Put differently, the cases studied change according to the chosen level of analysis, geographical location, or the unit of methodological or theoretical interest.<sup>533</sup> At the same time, hegemony remains almost always the same, namely being equalized to monopoly, homogeneity, or lack of dissent. While some part of the sociology of IR, with the help of the post-colonial theory and general “reflexive” vocabulary, can effectively protect itself from substantial critique, the way the latter essentially conceptualizes hegemony, or the absence of it, becomes evident and straightforward, when other scholars, less “cautious” or more naïve and “spoiled” by the quantitative fashions of the overall field, attempt to operationalize conceptualizations coming from the former strand.<sup>534</sup> In this case, it turns out that even the “radicals” are talking in the mainstream language concerning the primary point of their argument, namely dominance.

Thus, this chapter aims to overcome this problem by reversing the conventional logic of scholarly investigation. Instead of starting with the state of affairs in the discipline, either captured normatively or empirically, and then developing the respective theoretical framework, which conceptually reflects selected disciplinary trends, it starts with the concept of hegemony itself. The rationale for this is relatively straightforward: dominance is always dominance. However, its forms and mechanisms change depending on the realm of human activity and the historical epoch one lives in, the core logic of this phenomenon remains the same. Yet this is not to say that there is some Popperian third world or Platonic world of ideas where various ideas find their habitat. Instead, this is to say that the cumulative intellectual experience of humanity can be passed successfully through historical generations and disciplinary division, even if those who carry those meanings are unaware of the latter. Put differently, if we still read Plato, Hobbes, Kant, Gramsci, and E.H. Carr, it means that they all could capture something immutable about, or at least universally characteristic of, men and the way their socio-political and intellectual existence is organized, functions and develops.

This analogy allows for the abovementioned “reversed” logic of the author's investigation into the meaning of disciplinary hegemony. First, by the very “intellectual” linkage, the concept introduces, namely, that there should be something familiar between the Italian industrial capitalist and the British IR scholar, Sparta and the US disciplinary mainstream, the Bolsheviks and the Indian IR community, Thatcherism and the neo-neo

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<sup>532</sup> See section “Hegemony in the sociology of IR cage”

<sup>533</sup> Weaver and Tickner 2008; Peters and Wemheuer-Vogelaar 2016; Turton 2016, Kristensen 2016

<sup>534</sup> See subchapter 3.1

nexus in IR theory, “cooperation” as the nodal point of the neoliberal discourse and “power” as the focal point of the Realist theoretical framework, and so on. Thus, it gives the author of this work the hope that the commonality mentioned above allows drawing analogies and, by extension, conclusions concerning the disciplinary hegemony based on conceptualizations of hegemony elaborated for other realms of human activities. Put more clearly, by looking at Lenin’s hegemony or the one of Clark or Laclau, we might see something related to the disciplinary hegemony in IR.

Second, it allows us to start our investigation from not what is *out there* but from what is *in here*; namely, we can spot this reflexive perspective so ironically missed by those advocating the emancipation of the discipline of IR from its various Western-centric biases, i.e., what we say or think is not just a reflection of reality, but also a significant constitutive element of the latter. Focusing on the concept in its historical oscillation of meaning and context of usage also opens up for us a possibility of seeing how much the whole hegemonic tradition might condition our current understanding of disciplinary dominance, the previous development of the discipline itself, and the current shape of the mainstream of the field. Moreover, more importantly, it deprives us of conceptual presentism, both temporarily and in terms of disciplinary scope. The notion of conceptual presentism is used to address an issue of a lack of awareness among those involved in the sociology of IR research that their conceptualizations of disciplinary dominance are not the intellectual apex of disciplinary development; and what is thought by them to be a thorough innovation and novelty, is most likely a mere non-critical transfer of someone’s else concept “echoed” to them through the disciplinary mainstream. The latter is its temporal dimension. In terms of the scope of this presentism, the two previous chapters had effectively shown how much disciplinary sociology is missing compared to other realms of social and political theory and even its parental discipline.

However, before one proceeds to the analogies and possible ways out of the abovementioned conceptual stalemate, one must remember that we need to go through the corpus of writings on disciplinary hegemony present within the subfield of the sociology of IR. This journey is not a straightforward one. First, we will review existing literature on disciplinary dominance to show how the latter is treated and its connection with the larger disciplinary context in which it is employed. Second, when we are done with those reviews, it will be necessary to reconstruct the state and evolution of the literature, specifically concerning hegemony, since, as the initial “review of the reviews” will show, the subfield has slightly “deviated” from correctly conceptualizing hegemony, as from the matter that had already been successfully fixed, necessitating a refocus of “attention” to other, more “pressing” issues. Third, we will be obliged to highlight the problematic character of the existing literature within the subfield concerning its understanding of hegemony; however, not on terms internal to the literature, since then it does not make much sense (an “internal” critique is rarely something more than just an attempt to modify), but in terms of its relation to the previous two stories of hegemony, the “historical” and “parental discipline” ones. Although this third step is not directly crucial for substantiating the subsequently proposed borrowings and analogies, it is of tremendous importance for “destabilizing” the existing conceptualization of hegemony by showing how much they are based on the mainstream and simplified treatment of the latter.

The latter rationale is more of a tactical rather than strategic nature since it situationally deprives the literature of its “emancipatory” impetus and assumed critical stance rather than “theoretically” preparing grounds for the upcoming propositions for analogies. Those, in turn, are expressed in terms of the structure of narration and the way the chapter unfolds. First, as was already mentioned, we go through the existing reviews of hegemony within the subfield; second, we turn to a refocused story of hegemony, not so



much in terms of the authors mentioned, but in terms of the conceptual focus – for example, while most of the references to Kal Holsti go due to his observation regarding the Anglo-Saxon disciplinary condominium, this chapter includes him as to elucidate what he meant by hegemony, and what was the context of his assumptions. Similarly, if one speaks of hegemony within the so-called normative, or as the author prefers to call it, the emancipatory strand of the disciplinary sociology, it goes more about such accounts as Tickner’s neo-imperial disciplinarity rather than the issue of difference found in Blaney and Tickner.<sup>535</sup>

The penultimate step toward the “modification” of disciplinary hegemony, as it was mentioned above, consists in approaching the three most representative works acting as the expression of the subfield’s *zeitgeist*, both in its “empirical” and “conceptual” emanations. With his being done, we could finally approach the primary goal of this work, namely the abovementioned attempt at breaking the current conceptual stalemate. This becomes possible not only through the analogies drawn from the first two chapters but also due to the hidden standard line of speaking about hegemony which will be evident in the critical reading of the *zeitgeist* works. Again, as it has already been said, the sub-field turns out to be characterized by a paradoxical alignment with the mainstream of the parental discipline in its most reified form, namely that one Holsti had referred to as the classical tradition almost thirty years ago about IR itself. We do not know if he would subscribe to this point of view and his reaction to the current state of affairs within the subfield that he gave birth to. Yet, judging by some of his more recent comments, compared to that of the *Hegemonic Discipline*, he saw that the discipline is too much preoccupied with the notions of plurality and difference without giving a substantial thought to the disciplinary coherence, and paradoxically, the proclaimed ultimate aim of the field, namely that of limiting international conflict and increasing cooperation through the understanding of the international realm.<sup>536</sup>

By approaching and clarifying the “dominance” of the *classical tradition* within the subfield, as a result of what the author terms the “*Holsti curse*,” namely the inattentive and superficial reading of his now classic book on the sociology of IR, we would gain awareness of the subfield’s misreading of hegemony. Moreover, it would allow us to stay within the way of thinking about IR *as the international*, however, already protected from the blinding effect of the Holsti curse. In particular, we would be free from uncritically thinking of the discipline as composed of competing communities characterized by various material and non-material capabilities and only fighting for global dominance within the “international system,” which is IR itself. Only then might we turn back to the parental discipline as a source of conceptual borrowing and analogy, not to mention being ready to accept viewpoints of dominance exceeding the realm of IR. That is precisely when this work comes to its substantial and structural apex, namely when analogies and rereadings of hegemony are taking place. This would lead to various assumptions and hypotheses concerning the disciplinary hegemony and possible empirical studies to test those assumptions. Some of them had to be left for another work and other authors, either due to the personal lack of methodological expertise, time, or scholarly “stamina.” In contrast, others would be preliminary tested in reapproached within the last empirical part of this work, dealing with a case of two peripheral IR communities, namely Ukrainian and Belarusian.

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<sup>535</sup> Blaney and Tickner 2008; Tickner 2013

<sup>536</sup> Holsti 1985

## Hegemony in the sociology of IR cage

Peters and Wemheuer-Vogelaar start their review of the literature on the sociology of IR with a general observation that the discipline of IR is steadily moving to a significant increase in both levels of the geographical diversity of its “participants” and respective theoretical plurality.<sup>537</sup> However, the “desired” levels of diversity and plurality are still from the actual disciplinary reality. Despite the positive trends mentioned above, the discipline is still characterized by significant dividing lines of exclusion. This paradoxical situation, which stems from the simultaneous existence of these two trends, is their review’s primary point of interest. In turn, it is a preliminary introduction to the subsequent works of various scholars addressing this paradox.<sup>538</sup>

Moreover, they clarify that the term they used to approach the literature on the “(un)international character” of the IR scholarship is “Global(izing) IR Debate” rather than the sociology of IR.<sup>539</sup> They identify three primary pitfalls of the current state of the debate, namely its tendency toward dualism, normativism, and a lack of methodological rationale behind the studies on disciplinary self-perception.<sup>540</sup> The former relates to the inclination of the subfield to operate with the help of dualistic conceptual couples such as Orientalism vs. Occidentalism, Global South vs. Global North, and so on, which leads to limited analytical perspectives on the disciplinary dynamics and should be substituted with a more all-embracing framework, namely that of the geo-epistemology.<sup>541</sup> The latter allows us to speak of the “geo-epistemological” divides on the discipline rather than conventionally regarded in the subfield such as geopolitical, civilizational, or religious.<sup>542</sup> Moreover, the literature tends to be primarily focused on the issues of the normative realm, namely why the US (or any other IR community) dominance is “bad” for the discipline and what are the abstract “recipes” for improving the situation, without empirically explicating how this dominance is being exerted and practiced beyond the too narrow case studies, or too general speculations about the way the discipline ought to be “internationally.”<sup>543</sup>

In this respect, Peters and Wemheuer-Vogelaar base their typology of the literature on the disciplinary self-perception concerning the evolution of the abovementioned preoccupation with studying the diversity and division within the discipline of IR and define three strands within the latter literature, namely an “American Social Science” strand, “Conceptual-normative,” and “Empirical” strand.<sup>544</sup> The first strand, authors label as the pre-debate, although its actual content still “haunts” the discipline. The core of the debate is located with Hoffman and his thesis regarding the naturally and essentially American character of the IR; otherwise put, the field was not able to develop anywhere else apart from the US, and in no way that it develop due to a variety of factors ranging from the policy-academia linkage in the US, to one of the American “epistemic” cultures, with most of the subsequent works being either a confirmation of this initial thesis, or an opposition to, voiced either normatively, or empirically.<sup>545</sup> Ole Weaver is placed by the authors of the review as the member of this strand, on par with others, as the one who clarified this thesis by saying that although the way IR is done is strongly associated with the US fashions, there was not a historical inevitability for it to develop this way since

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<sup>537</sup> Peters and Wemheuer-Vogelaar 2016, pp.1-2.

<sup>538</sup> Ibid., pp.1-2; Acharya 2015 cited in Peters and Wemheuer-Vogelaar 2016, p.2

<sup>539</sup> Ibid., p.2; Here the double allusion of the authors is quite evident: in terms of the (un)international character of IR it goes to Weaver (1998), while the shift to “Global(izing) IR Debate” is a clear hint on Acharya (2015).

<sup>540</sup> Ibid., pp.2-3.

<sup>541</sup> Ibid; Mignolo 2009, Stoffle 2013, Agnew 2007, Preston 2003, Harding 1998 cited in Peters Wemheuer-Vogelaar 2016, pp.2-3

<sup>542</sup> Ibid., p.4; Hutchings 2011, Hobson 2012, Nayak and Selbin 2011a, Acharya and Buzan 2007a, Chen 2011, Tickner 2013 cited in Peters and Wemheuer-Vogelaar 2016, p.4

<sup>543</sup> Ibid., pp.4-5; Tickner and Weaver 2009, Acharya and Buzan 2007a cited in Peters and Wemheuer-Vogelaar 2016, pp.4-5

<sup>544</sup> Ibid., pp.5-7.

<sup>545</sup> Peters and Wemheuer-Vogelaar, p.7; Hoffmann 1977 cited in Peters and Wemheuer-Vogelaar 2016, p.7

others had good reasons and chances of going their “way” concerning the discipline, that is rightly expressed in the diversity he observed within the European IR.<sup>546</sup> Later on, the primary focus of many working within the sub-field became an “empirical dueling” with Hoffmann’s thesis either in terms of arguments regarding itself hierarchical character of the US domestic discipline or the influences the “rest” of the profession has on the US disciplinary core, on par with problematizing the very conceptualizations of dominance present in Hoffmann.<sup>547</sup> Peters and Wemheuer-Vogelaar conclude that the primary flaw of this strand is an excessive focus on the national-level dynamics of disciplinary processes, on par with omitting the issue of hegemonic knowledge production elaborated in other fields of social sciences.<sup>548</sup>

However, according to the review, this lack of attention was “fixed” with the second strand of the literature, namely the normative one.<sup>549</sup> Put differently, this strand provides an alternative to the euro-centric responses to the thesis of Hoffmann, which account for highlighting the intellectual hegemony of the West within the discipline.<sup>550</sup> Initially, according to Peters and Wemheuer-Vogelaar, the primary source of Western domination was seen in its grip on theory production. The solution was seen as merely “locating” the non-Western forms of theorizing that might act as a counter-hegemonic tool; subsequently, this strand had to accept that little, if any, of non-Western theory is found globally.<sup>551</sup> In this case, the attention was switched to the intellectual gate-keeping practices that, assumably, prevented the appearance and growth of the latter type of theories – either in the form of exclusionary narratives and conceptual frameworks or through the biased structures of professional evaluation and linguistic requirements.<sup>552</sup> Yet, this is not to say that there is no way out of this situation; according to the authors, apart from the sub-strand which advocated for the development of local, nationally oriented theorizing, there appeared another current that attempted to overcome the pitfalls of “provincialized” theorizing through moving to the “post-Western” theory, namely the one based on local sources, however, transcending the latter, and its mainstream alternative, in the form of Western theory.<sup>553</sup> Of particular interest for the authors was another sub-current within this strand of the literature, the one that locates the Western hegemony in specific conceptual narratives revolving around certain notions, such as “state” or “sovereignty,” thus aiming at reconstructing those from a non-Western perspective as to overcome the latter hegemony.<sup>554</sup>

Finally, we come to what Peters and Wemheuer-Vogelaar refer to as the empirical strand, which runs parallel to the normative one and engages in an empirical analysis of IR within and outside the West.<sup>555</sup> Here the most telling example is the edited volume by Weaver and Tickner that had as its primary aim to speak of diversity of the field in a non-hegemonic way; however, as the authors themselves acknowledge, there was less heterogeneity in the way IR is practiced around the world, then they had initially expected.<sup>556</sup> Thus, it leads Peters and Wemheuer-Vogelaar to arrive at a two-fold conclusion, namely that the intellectual hegemony of the West might be in place and, on

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<sup>546</sup> Ibid., p.8; Weaver 1998, Friedrichs 2004, Jorgensen and Knudsen 2006, Crawford and Jarvis 2001 cited in Peters and Wemheuer-Vogelaar 2016, p.8.

<sup>547</sup> Ibid.; Kristensen 2013, Roesch 2014, Turton 2015 cited in Peters and Wemheuer-Vogelaar 2016, p.8.

<sup>548</sup> Ibid.; Smith 2002, Chakrabarty 2000, Harding 1998 cited in Peters and Wemheuer-Vogelaar 2016, p.8.

<sup>549</sup> Ibid.

<sup>550</sup> Ibid.

<sup>551</sup> Ibid., p.9; Acharya and Buzan 2007a cited in Peters and Wemheuer-Vogelaar 2016, p.9.

<sup>552</sup> Ibid.; Hobson 2009, Inayatullah and Blaney 2004, Kayaoglu 2010, Chen 2012, Nayak and Selbin 2011b, Tickner and Blaney 2013 cited in Peters and Wemheuer-Vogelaar 2016, p.9.

<sup>553</sup> Ibid.; Makarychev and Morozov 2013; Song 2001; Ling 2014; Shimizu 2011; Shani 2008; Khong 2013 cited in Peters and Wemheuer-Vogelaar 2016, p.9

<sup>554</sup> Ibid.; Murithi 2007, Neuman 1998, Tickner and Blaney 2012 cited in Peters and Wemheuer-Vogelaar 2016, p.9.

<sup>555</sup> Peters and Wemheuer-Vogelaar, p.10

<sup>556</sup> Ibid., p.10 ; Weaver and Tickner 2009, p.1 cited in Peters and Wemheuer-Vogelaar 2016, p.10.

the other hand, that it might be better to look for less grandiose “difference,” not only because of the practicality of such an approach but also due to a possibility of finding the “real” difference, as many other authors suggested.<sup>557</sup> They notice that this strand evolved out of the second strand’s mainstreamization and adaptation of quantitative methodology and enlarging the pool of units and objects of analysis ranging from teaching practices and citation patterns to institutional and discourse analysis.<sup>558</sup> Finally, at the end of the review of the third strand, they point to the fact that empirical studies within this “camp” had shown that IR is way more heterogenous than is usually assumed; however, this heterogeneity might well be the result of the internal power-struggles within the core of the discipline, and the issue of diversity might be not so much about really transforming the profession, but rather a way of winning the power struggle on the side of one of the competing disciplinary “groups.”<sup>559</sup>

In her doctoral thesis, Wiebke Wemheuer-Vogelaar was more interested in the disciplinary dominance/hegemony as a counterfactual to her primary focus of interest, namely plurality and diversity within the field of IR.<sup>560</sup> In the most abstract sense, she divides the literature on disciplinary hegemony into two broad categories, the first being works of a normative character and the second having an empirical orientation.<sup>561</sup> Overall, the general direction of most of the works about disciplinary dominance, according to her, revolves around several claims: first, the scholars based in the West are pervasive in terms of the quantity of the work produced and consumed in purely quantitative terms, as well as in “qualitative,” namely that their contribution to the disciplinary theory development is higher than that of others.<sup>562</sup> This pattern is the most evident, according to Wemheuer-Vogelaar, when one takes the Global South-North division. However, similar divides exist within the Global North itself, namely the US predominance over others and the particular position of the UK within the European IR.<sup>563</sup> Instead of covering the whole canon in detail, she focuses on three works, primarily due to their empirical orientation and relative recency of publication: Daniel Maliniak, Helen Turton, and Peter Marcus Kristensen.<sup>564</sup> Luckily, her review choice coincides with this thesis’s view on the importance of those works, thus partially allowing avoidance of the review cross-coverage.

In Turton’s work, she sees an attempt to test the conventional American disciplinary dominance thesis along five dimensions of academic knowledge production: institutional, theoretical, methodological, agenda-setting, and gatekeeping.<sup>565</sup> She highlights the novelty of Turton’s approach, namely avoiding excessive normative speculations about disciplinary dominance and instead focusing on “unpacking” the latter concept on par with empirically testing it – with such an approach, it turns out that one cannot speak of the American dominance, in any of the respects, apart from the institutional preponderance, since overall the discipline turns out to be inclusive, diverse and pluralistic.<sup>566</sup> Moreover, she highlights and commends her attempt to forge the

<sup>557</sup> Ibid.; Bilgin 2008, p. 6 cited in Peters and Wemheuer-Vogelaar 2016, p.10; Acharya and Buzan 2007a, Lizie 2011, Agathangelou and Ling 2004 ; Mgonja and Makombe, 2009 cited in Peters and Wemheuer-Vogelaar 2016, p.10.

<sup>558</sup> Ibid., p.11; Hagmann and Biersteker 2014, Sharma 2010, Tickner 2009, Drulak et al. 2009, Maliniak and Powers 2014, Tsunoda 2013, Wemheuer-Vogelaar 2013, Qin et al. 2013, Kristensen and Nielsen 2013, Aydinli and Mathews 2000, Grenier and McMillan 2010, Legro and Moravcsik 1999, Feaver 2000, Hellmann et al. 2000, Schweller 2000 cited in Peters and Wemheuer-Vogelaar 2016, p. ; Tickner 2003, p.302 cited in Peters and Wemheuer-Vogelaar 2016, p.11.

<sup>559</sup> Ibid., p.11; Blaney and Tickner 2013, pp. 2–4 cited in Peters and Wemheuer-Vogelaar 2016, p.11.

<sup>560</sup> Wemheuer-Vogelaar 2018; Although many similar arguments might be found in Wemheuer-Vogelaar and Risse (2016), the collective character of the latter work, on par with its wider thematic reach, makes it meaningful to pay additional attention to the former dissertation, both for the sake of precision with regard to arguments put forward by her and respective personal referencing,

<sup>561</sup> Wemheuer-Vogelaar 2018, p.11; Tickner 2013, Hobson 2012, Wæver and Tickner 2009, Smith 2002, Mathews and Aydinli 2000, Maliniak et al. 2018, Turton 2015, Kristensen 2015a cited in Wemheuer-Vogelaar 2018, p.11.

<sup>562</sup> Ibid.

<sup>563</sup> Ibid.

<sup>564</sup> Ibid.

<sup>565</sup> Wemheuer-Vogelaar 2018 p.11; Turton 2015, p.7 cited in Wemheuer-Vogelaar 2018, p.11.

<sup>566</sup> Ibid.; Turton 2015, p.7 cited in Wemheuer-Vogelaar 2018, p.11.

Gramscian understanding of disciplinary dominance, which in Wemheuer-Vogelaar's reading of Turton's conceptualization turns out to be the result of the mutually constitutive interaction between the disciplinary structures and academic agency.<sup>567</sup> In addition, she highlights the mixed character of Turton's conceptualization of hegemony which leads to the vanishing of the demarcation line between coercive domination and consensual one in the form of hegemony: this evaluation she draws mainly from the unclear character of the issue of the editor's intentionality about maintaining or suppressing the tendencies to the US dominance.<sup>568</sup> Ultimately, she points to the fact that Turton could find clear evidence of the US dominance only concerning one of her indicators, namely the institutional one.<sup>569</sup> Wemheuer-Vogelaar elaborates on this point of Turton, namely that most of the publications in the IR journals come from scholars located in the US or associated with US institutions, on par with the simultaneous parochiality of the US IR, which supports earlier claims and studies concerning this issue.<sup>570</sup> In terms of citation practices, she complements the latter claim of Turton by noting that this parochiality expresses itself in a manner that the US scholars are "everywhere." At the same time, the US scholarly "market" is closed to outsiders.<sup>571</sup>

Following the issue of insularity and the US disciplinary hegemony, Wemheuer-Vogelaar moves to Maliniak, who highlights that the US IR community accounts for almost one-third of the global IR community, which in their study included thirty-two countries.<sup>572</sup> Moreover, in terms of IR training, universities in the US tend to train a disproportionately high number of IR scholars compared to other communities, on par with a high level of prestige expressed by those being "outside" of the US community concerning institutions and journals located there.<sup>573</sup> On top of this, Maliniak found that in terms of professional identity, most IR scholars tend to associate with the global community rather than their national community, with some exceptions being in places such as China and Chile.<sup>574</sup> Finally, Wemheuer-Vogelaar commends another finding of Maliniak's study: that some IR communities, such as those in Asia and Latin America, are more insular than the respective US community, which acts as a role model concerning the insularity of its scholarly interactions with other communities.<sup>575</sup>

After a short review of the work done by Maliniak and other scholars involved in TRIP projects at the College of William and Marry, Wemheuer-Vogelaar moves to Kristensen, who managed to empirically show that apart from the American dominance thesis, there should be another one, namely the Ivy League dominance thesis.<sup>576</sup> In particular, after mapping the author affiliation of the authors publishing the most prestigious IR journals, it turned out that their geographical clustering roughly corresponds to one of the locations of the most prestigious US educational institutions.<sup>577</sup> Moreover, the same pattern was observed for Europe, and the linkage between the dominant block in Europe and US was traced through the co-authorship network.<sup>578</sup> However, she notices that Kristensen could not test the relation between the predominance in articles' publishing and its effect on the "content" of the discipline.<sup>579</sup>

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<sup>567</sup> Ibid., p.12; Turton 2015 p.7 cited in Wemheuer-Vogelaar 2018, p.13.

<sup>568</sup> Ibid.; Turton 2015, p.12.

<sup>569</sup> Ibid.

<sup>570</sup> Ibid., p.13; Turton 2015, p.114 cited in Wemheuer-Vogelaar 2018, p.13; Gläser and Aman 2017, Biersteker 2009, Wæver 1998 cited in Wemheuer-Vogelaar 2018, p.13

<sup>571</sup> Ibid.; Wemheuer-Vogelaar 2013, Gläser and Aman 2017 cited in Wemheuer-Vogelaar 2018, p.13.

<sup>572</sup> Ibid.; Maliniak et al.,2018 cited in Wemheuer-Vogelaar 2018, p.13.

<sup>573</sup> Ibid.; Maliniak et al. 2018, p.12 cited in Wemheuer-Vogelaar 2018, p.13.

<sup>574</sup> Ibid.; Maliniak et al. 2018, p.18 cited in Wemheuer-Vogelaar 2018, p.13.

<sup>575</sup> Ibid.; Maliniak et al. 2018, p. 19 cited in Wemheuer-Vogelaar 2018, p.13.

<sup>576</sup> Ibid., p.14; Kristensen 2015a cited in Wemheuer-Vogelaar 2018, p.14

<sup>577</sup> Ibid.,14.; Kristensen 2015a, p.17 cited in Wemheuer-Vogelaar 2018, p.14

<sup>578</sup> Ibid.; Kristensen 2015a, p.17 cited in Wemheuer-Vogelaar 2018, p.14

<sup>579</sup> Ibid.

In this respect, she turns back to Turton, who, according to her, with the help of data from a content analysis of the English-language IR journals, argued that, although there is some dominance in terms of the theory-production output on the side of the US IR community, the latter is not able to establish a full-blown theoretical dominance in the face of disciplinary pluralism and the ascendance of the non-Western IR theory.<sup>580</sup> Similarly, she brings in Maliniak to support the claim put forward by Turton, namely his observation that, according to their analysis, there is an apparent lack of unidirectional flow of “disciplinary preferences” from the US IR community to the rest of the world.<sup>581</sup> This seems to be of great importance for Wemheuer-Vogelaar since he discusses the conventional claim regarding US dominance in the literature on disciplinary self-perception.<sup>582</sup> Moreover, she brings together the findings of Turton and Maliniak to assume that the discipline might be characterized more by insularity rather than by US dominance since the existing variety of methodologies and epistemological positions tend to be clustered nationally and regionally.<sup>583</sup> In this respect, she assumes that, as some authors within the subfield noticed, the issue of the US dominance is more related to the self-perception of the scholars outside of the US core rather than the objective state of affairs in the discipline.<sup>584</sup>

Now we move to Helen Turton, who, as one was already able to guess, is among those who paid specific attention to the existing conceptualizations of disciplinary hegemony.<sup>585</sup> Although her initial terminological reference is “dominance” rather than hegemony, she effectively moves on to the latter through the excuse of the disciplinary convention.<sup>586</sup> Moreover, for the sake of her subsequent empirical analysis, she equalizes the two despite a short comment on some differential usage of the two, namely scholarly emulation (consensual dominance/hegemony) and marginalization (coercive dominance), instead focusing on channels and mechanisms of the latter two; put differently, she is not much preoccupied with what disciplinary hegemony/dominance *is*, but rather *how* dominance/hegemony is taking place.<sup>587</sup> In this sense, hegemony and dominance are the same. The only difference is the channels and “tools” of exercising it; conversely, we speak of disciplinary dominance and hegemony being two sides of the same coin, namely that of dominance.<sup>588</sup> She categorizes the existing conceptualizations of hegemony as related to the two-fold conceptualization of dominance mentioned above. She comprises a five-element framework: intellectual agenda setting, theoretical dominance, epistemological and methodological preponderance, institutional dominance, and disciplinary gatekeeping.<sup>589</sup><sup>590</sup>

The first, namely the agenda-setting ability, is a situation when the dominant IR community can align the research focus of the discipline with the foreign-policy concerns of the country where the former community is located.<sup>591</sup> This ability might be understood in a two-fold manner, at least in Turton’s interpretation: first, it is the equalization of the study of the dominant state’s foreign policy with the study of the international system due

<sup>580</sup> Ibid.; Turton 2015 p.141 cited in Wemheuer-Vogelaar 2018, p.14

<sup>581</sup> Ibid.; Maliniak 2018, p.12 cited in Wemheuer-Vogelaar 2018, p.14; Turton 2015, p.42 cited in Wemheuer-Vogelaar 2018, p.14

<sup>582</sup> Ibid., Smith 2002, 2000 cited in Wemheuer-Vogelaar 2018, p.14

<sup>583</sup> Ibid., p.15; Turton 2015, pp.27,90; Maliniak 2018, p.141. cited in Wemheuer-Vogelaar 2018, p.15

<sup>584</sup> Ibid., p.16; Friedrichs 2004b, Schneider 2014, Tan 2009, p. 128 cited in Wemheuer-Vogelaar 2018, p.16.

<sup>585</sup> Turton 2016

<sup>586</sup> Ibid., p.7

<sup>587</sup> Ibid.

<sup>588</sup> Ibid.,p.8

<sup>589</sup> One should not be surprised by the evident terminological tautology being felt in Turton’s review of the literature on disciplinary dominance, and the subsequent conceptual and operationalization framework of her own. Apart from the fact, that the current review of her work significantly decreases the level of conceptual tautology present in her work, it still acts as a useful implicit hint on the overall fuzziness of her conceptual work. This becomes even more ironic since one of the main arguments of Turton (2017, p.8) is that conceptual ambiguity with regard to disciplinary dominance had brought the disciplinary self-perception to an investigatory dead-end.

<sup>590</sup> Turton 2016, p.9.

<sup>591</sup> Ibid.; Hoffmann 1977, p.47 cited in Turton 2016, p.9.

to the former's centrality in the latter, thus defining the research subject of IR; and second, that the dominant state itself is capable of shaping the of IR (and, presumably, its domestic IR community) concerning its foreign policy interests.<sup>592</sup> The second is when IR theories produced within American IR dominate the disciplinary thinking of other IR scholars belonging to different communities. This "dominance" is more of an unconscious character and does not hinge, at least to a significant degree, on the intellectual/disciplinary quality of the latter.<sup>593</sup> This kind of dominance is seen in the amount of theory being "produced" by the US IR community and the amount of the latter "consumed" by other communities.<sup>594</sup> Moreover, it is associated with establishing the theoretical mainstream/orthodoxy/core of the discipline; put differently, some IR theories tend to be seen as "belonging" to the US IR community, while others do not, thus making their significant "presence" in the discipline (published dimension) be taken as an indicator of a theoretical dominance of a particular IR community.<sup>595</sup>

The third conceptualization of disciplinary dominance is that of the epistemological and methodological character – similar to theoretical dominance, pertains to a particular set of assumptions regarding the nature of knowledge, ways, and techniques one has to use to arrive at reliable knowledge constituting the backbone of IR.<sup>596</sup> In this case, we speak of such a set as linked to one of the national IR communities, which was able to establish it as the basis of disciplinarity of IR, put differently if IR as a whole defines something as reliable knowledge. This definition reflects the standards of one particular community, then we speak of epistemological disciplinary dominance or intellectual structural bias.<sup>597</sup>

The fourth typical operationalization of disciplinary dominance relates to the institutional dimension and speaks of the corrective structure. In particular, it goes about the number of IR scholars comprising each national IR community and the number of various research centers/institutions located within the latter communities.<sup>598</sup> In this sense, we speak of disciplinary dominance/hegemony as directly linked to the "aggregate" human and institutional resources available to an IR community, therefore designating it as a dominant community with a clear preponderance in this respect. Finally, Turton's fifth conventional conceptualization of disciplinary dominance is the gate-keeping ability of an IR community.<sup>599</sup> This form of dominance is based on the power of an IR community to control the primary international disciplinary arenas.<sup>600</sup> For example, in this respect, one might speak of academic journals, and the latter control is primarily mediated by the editors subscribing to a particular view of IR as a scholarly endeavor, thus effectively restricting the participation of those who do not adhere to the same view.<sup>601</sup>

A similar approach to reviewing the literature on disciplinary dominance is found in the book edited by Audrey Alejandro.<sup>602</sup> The latter might be the only publication in the recent scholarship on disciplinary self-perception, which devotes a whole chapter to the problem of disciplinary hegemony as constituting the backbone of the sociology of IR. First, a reservation is made that the core-periphery model is a default starting point in the

<sup>592</sup> Ibid., p.9-10; Smith 2002a, 2004 cited in Turton 2016, p.9; Smith 2000, p.395 cited in Turton 2016, p.10.

<sup>593</sup> Ibid., p.10; Acharya and Buzan 2007, p.294 cited in Turton 2016, p.10.

<sup>594</sup> Ibid.; Holsti, 1985 cited in Turton 2016, p.10; Wæver 1996, 1998 cited in Turton 2016, p.10; Jarvis 2001, p.327 cited in Turton 2016, p.10.

<sup>595</sup> Ibid.; Brown, 2001, cited in Turton 2016, p.10; Tickner, 2011 cited in Turton 2016, p.10.

<sup>596</sup> Ibid.; Smith 2000, p.383 cited in Turton 2016, p.10.

<sup>597</sup> Ibid.; Friedrichs 2004, p.2 cited in Turton 2016, p.10.

<sup>598</sup> Ibid.; Biersteker 2009 cited in Turton 2016, p.10; Friedrichs and Wæver, 2009 cited in Turton 2016, p.10; Volten and Friedrichs 2004 cited in Turton 2016, p.10.

<sup>599</sup> Ibid., p.11

<sup>600</sup> Turton 2016, p.11; Aydinli and Mathews, 2000 cited in Turton 2016, p.11; Arlene Tickner, 2003a cited in Turton 2016, p.11

<sup>601</sup> Ibid.; Biersteker 2009, p.311 cited in Turton 2016, p.11.

<sup>602</sup> Alejandro et al 2018; This should not be surprising since the collective of authors includes Helen Turton, and various passages found there bear suspicious similarities, if not identical, to those found in her book mentioned above, on par with her doctoral dissertation which was later on published as the book mentioned above. Thus, despite the editor being Audrey Alejandro it might be reasonably assumed to be a better elaboration of the earlier typology and conceptualization of the disciplinary hegemony by Turton.

subfield, with the US being conventionally placed at the top of this hierarchical structure.<sup>603</sup> Or put differently, and within the vocabulary of the core-periphery model, the reference goes to Friedrichs, who sees IR as “layered” communities, and the US one being its core exercising intellectual hegemony reflected in the former’s self-positioning concerning the latter.<sup>604</sup> Thus, hegemony is approached from the structural perspective, where intellectual dominance acquires its spatial flavor. In this regard, a substantial question is posed: what does it mean to be hegemonic, or what does disciplinary hegemony mean?

For this sake, there is a shift towards IR itself, and the answer appears to be twofold, namely that there are two broad categories of understanding the disciplinary hegemony – the Realist and Gramscian. The first amounts to a mere “power over” stemming from the preponderance of material resources and capabilities. The second pertains to the consensual component of power, its leadership fraction, and the internalization of subalternity with the resulting coercive and consensual orders.<sup>605</sup> From this twofold typology, the respective typology of forms of disciplinary dominance is derived, namely intellectual and institutional hegemony.<sup>606</sup> In terms of the latter, it goes about the number of IR scholars, research and publishing institutions, domestic scholarly “market” size, international ranking and prestige, and the close connection with the local state and various private foundations, which allows for sheer and generous funding, which in its turn, explains the abovementioned indicators of the institutional preponderance.<sup>607</sup>

Yet, another question arises, naturally linked to the one of the institutional preponderance of the US IR community, namely, if the latter predominance is capitalized into the intellectual one.<sup>608</sup> The review stipulates that there is a clear division among the authors writing on the issues in the realm of the sociology of IR and disciplinary self-perception. Some confirm the successful conversion of the material capabilities of the US IR community into intellectual ones. In contrast, others point to the opposite results stemming from their empirical studies. In particular, those who support the claim regarding the intellectual dominance of the US IR community argue that the latter was able to establish the intellectual monopoly by being able to define for the whole discipline its subject matter and supplant its theoretical and methodological fashions on other IR communities.<sup>609</sup> However, since imagining the “coercive implanting” of theoretical perspective and methodological apparatuses is problematic in a contemporary scholarly discipline, the review assumes that this kind of disciplinary dominance functions akin to the one found in Gramsci and his conceptualization of hegemony.<sup>610</sup> In this sense, it goes about emulation and self-subscription to the US mainstream preferred way of doing IR, taking the forms of an appropriate choice of a research subject matter, employment of one of the mainstream theoretical frameworks on par with adhering to the quantitative methodology.<sup>611</sup> Those who do not follow suit are faced with the “coercive apparatus” of

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<sup>603</sup> Ibid., p.108; Friedrichs and Weaver 2009, p.261; Thomas Biersteker 2009, p.309; Kristensen 2015; Lipson et al. 2007; Sharman 2008; Smith 2000, 2002; Tickner 2003a, 2013 cited in Alejandro 2018, p.108.

<sup>604</sup> Ibid.; 2004: xi cited in Alejandro 2018, p.108

<sup>605</sup> Ibid.; Burnham 1991, p.73; Barnett and Duvall, 2005; Bates 1975, p.352; Joseph 2008, p.109; Cox 1996, p.151; Cox 1994, p.366 Rupert 2009, p.177; Cox 1994: 366 cited in Alejandro 2018, p.108

<sup>606</sup> Ibid., p.109.

<sup>607</sup> Ibid., pp.109-10; Biersteker 2009, Weaver 1998, Aydinli and Mathews 2008, Crawford 2001, Hellmann 2011, Tickner 2003b; Turton 2016, p.93; Biersteker 2009, p.309; Jordan et al. 2009, p.7; Hoffman 1977, p.45; Mosely 1967, p.375; Parmar 2002, p.13; Parmar 2009, 2011; Joseph 2008, p.11. cited in Alejandro 2018, pp.109-110.

<sup>608</sup> Ibid., p.110.

<sup>609</sup> Alejandro et al 2018, p.110.; Smith 2002, Agathangelou and Ling 2004, Chen 2011, Krippendorf 1987, Tsygankov and Tsygankov 2007, Jackson 2011, Kristensen 2015; Cox and Nossal 2009, p.303 cited in Alejandro 2018, p.110.

<sup>610</sup> Ibid., pp.110-111; Bieler and Morton 2004, p.87; Mittleman 2000, p.167; Cox 1981, p.136; Morton 2003, p.156; Gramsci 2005, p.36 cited in Alejandro 2018, pp.110-111.

<sup>611</sup> Ibid., p.111; Bilgin 2008, Tickner 2003b, 2008 cited in Alejandro 2018, p.111.



the field and sanctioned for the lack of compliance with the help of disciplinary marginalization.<sup>612</sup>

However, the review asks another question, namely of the existence of such kind of US IR community's disciplinary hegemony. It concludes that there is not much empirical evidence supporting this thesis.<sup>613</sup> It finds the source of this misconception mainly in the lack of empirical data substituted by the anthropological experience of authors putting forward this assumption. In contrast, recent data shows that if intellectual hegemony means a unified theoretical, methodological and issue-specific space, IR is a non-hegemonic discipline.<sup>614</sup> In particular, the review refers to the TRIP data regarding the views and preferences of IR scholars around the Globe, on par with Turton's disaggregation of the conventional notion of the disciplinary hegemony on par with her subsequent empirical test of the resulting operationalizations.<sup>615</sup> Particular attention of the review was paid to Turton's ability to prove the lack of emulation of the US IR community style of IR scholarship within the discipline, thus refuting the claim of some authors that the local US preferences are transmitted globally and, by extension pointing to the absence of the Gramscian style hegemony in the discipline.<sup>616</sup> Moreover, the review highlights the fact that Turton's findings are of novelty for the subfield since, as far back as 2005, there were clear signs regarding the absence of intellectual hegemony on the side of the US IR community, with a clear theoretical "leaning" towards liberalism, instead of the expected realism.<sup>617</sup>

As one can see from the abovementioned reviews of the state of the literature on the sub-field of sociology of IR, although there was a subsequent refocus of the problematique to one of the concepts of dominance and, by extension, hegemony, it lacks a more "hegemony" focused review and categorization of the canon. In particular, being preoccupied with various overarching concepts and specific problems, each study omitted the very substance of the notion in its sub-fields evolution. Thus, the review that follows is primarily dictated by the latter need, thus giving reasonable justification, and even excuse, for the specificity of focus and omittance of the significant number and variety of works in the sub-field.

### 3.1. Holsti's curse and double self-referentiality

The primary purpose of this subchapter is to provide a critical reading of the existing literature on disciplinary hegemony within the sociology of IR. However, this task is not accessible if we keep in mind the variety of writings employing diverging understandings and conceptualizations of the latter, on par with an even greater variety of more narrow issues brought under discussion under the umbrella of those conceptualizations. Moreover, as was already mentioned, the normative strand of the sociology of IR is to some extent protected from any critique due to the specificity of its jargon and conceptualizations, with the problematic character of the latter being evident only during the operationalization process found in the studies belonging to the empirical strand. Thus, the following subchapter contains several "case studies" that exemplify how hegemony is conceptualized within the empirical strand of disciplinary sociology.

Here we focus on three issues of conceptual character: the first concerns hegemony and its equalization with monopoly. The latter equalization is observed concerning disciplinary dimensions conventionally defined by the subfield, namely material

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<sup>612</sup> Ibid., p.112; Aydinli and Mathews 2008; Bleiker 2001; Cox 1987, p.409; Hamati-Ataya 2011 cited in Alejandro 2018, p.112

<sup>613</sup> Ibid.

<sup>614</sup> Ibid.

<sup>615</sup> Ibid; Jordan et al., 2009; Turton, p. 9 cited in Alejandro 2018, p.112.

<sup>616</sup> Ibid., pp.113-114; Turton 2016, pp.37-39, 80; Brown 2001, Jorgensen and Knudsen 2006; Kennedy-Pipe 2007 cited in Alejandro 2018, pp.113-114.

<sup>617</sup> Ibid., p.114; Walker and Morton 2005, p.353 cited in Alejandro 2018, p.114

(institutional) and ideational (theoretical), which ultimately results in hegemony being approached in a vulgar realist manner. The second deals more with a degree of misinterpretation or, better to say, dangerously simplistic conceptual transfer of the Gramscian notion of hegemony to the realm of disciplinary sociology. The latter not only nullifies its “Italian flavor” and makes it closer to the neo-liberal conceptualization of soft power but also supports and, simultaneously, has its roots in another problematic assumption concerning disciplinary dominance, namely that of the opposition of material vs. ideational understandings of IR’s disciplinarity. The explication of the latter one concludes this subchapter.

Moreover, the three are not conceived to be a mere accidental set of misinterpretations and a lack of attention to the conceptual discipline or “loses in translation” which always arise when one approaches such complex issues as analyzing a second-order observing system, to which IR belongs in the right of a scholarly discipline.<sup>618</sup> Instead, this work links them towards general trends or characteristics of disciplinary sociology, namely double self-referentiality and what the author of this work prefers to call the “Holsti’s curse.”

The former is the paraphrase of the self-referentiality of the disciplinary sociology put by Weaver, which referred to the fact that IR scholars treat their object of study as one of the internal constitutive factors concerning their discipline.<sup>619</sup> In particular, it involves the disciplinary convention regarding the influence events within the international realm have on the discipline’s development. In this work, we bring this thesis even further by assuming that IR scholars treat the international as one of the constitutive disciplinary factors and analytically approach the discipline as the international itself. More specifically, it pertains to the fact that despite several conceptual borrowings from the post-colonial theory and vocabulary of the sociology of science, the underlying logic remains the same as the one found in IR’s treatment of its object of study, namely the international. Moreover, this logic strongly reminds the one found in the disciplinary mainstream, namely the neo-neo couple of realism and liberalism, which is, in the best case, ironic if one keeps in mind that this part of the theoretical mainstream is usually taken as a synonym of disciplinary domination, which is the focal point of sub-fields identity.<sup>620</sup>

However, this alone does not fully explain those inclinations of disciplinary sociology, thus necessitating an additional explanation. The one that might shed some light on why precisely those ways of thinking about the discipline had arisen. This work explains the abovementioned situation in disciplinary sociology as a result of an inattentive reading (a typical scholarly “scanning”) of the now classic book, one of the first attempts to give an empirical view on the discipline, namely Kalevi Holsti’s “*The Dividing Discipline*.”<sup>621</sup> The problem is that the book contains two large thematic blocks, one describing the state of the disciplinary theory and another the patterns of scholarly publishing, i.e., production/communication. The former concludes that, theoretically, the discipline is “dominated” by a set of theoretical assumptions and research orientations which he refers to as the classical tradition. At the same time, the latter speaks of the Anglo-American disciplinary dominium, i.e., the significant relative weight of the British and US scholars in terms of “disciplinary production.” This thematic coupling is not problematic in itself.

However, on several occasions, Holsti brings them together to equalize the two, with the most explicit one introducing the equivalence of “intellectual hegemony” and

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<sup>618</sup> Pena 2020.

<sup>619</sup> Weaver 1998, p. 691.

<sup>620</sup> Hamati-Ataya, 2011

<sup>621</sup> Holsti 1985

“national academic hegemony.”<sup>622</sup> And those passages are among the most frequently encountered within the works of subsequent “sociologists of IR” This equalization might be seen present in almost all of the following scholarship on disciplinary hegemony, with exceptions being those who abstained from clearly defining their understanding of disciplinary hegemony. Moreover, suppose one adds that Holsti spoke of “national academic oligopoly” as a softer alternative to the one of hegemony. In that case, the line of equivalence he had established becomes clear – hegemony is not identical but at least synonymous with monopoly. The primary unit of analysis of the discipline is a national IR community.<sup>623</sup> However, within the context of the whole work, this line of equivalence is not preserved.

Yet again, the real problem is not this double self-referentiality nor the consequences of monopolistic thinking injected into disciplinary sociology. The real problem is a lack of reflexivity of those working within the field concerning those two. With this lack of reflexivity and the protecting shield of “reflexive” vocabulary borrowed from post-colonial theory, or neo-Gramscianism, comes the conceptual dead-end concerning disciplinary hegemony. In particular, we can change methodology and increase the empirical elaboration of one or another issue in a disciplinary realm; nonetheless, we still think of it in terms of national monopoly. And whether this monopoly is institutional or intellectual, it does not change much – the realm of application changes, but not the logic. And since we naturally think of the discipline in terms of the domain itself, there is no surprise that this monopolistic thinking naturally resonates with the one contained in realism or even liberalism. Thus, we cut away not just some distance subfields of sociology of knowledge or Science and Technology Studies. Still, even that conceptual landscape present in IR can give us more conceptual tools for working with the issue of disciplinary dominance. Hence, what follows, is an attempt to illustrate how these limitations affect the sub-fields thinking about disciplinary hegemony.

### 3.1.1. Diversity and the “structural” or “monopoly paradigm.”

We return to Wemheuer-Vogelaar because of her interest in adequately conceptualizing diversity for disciplinary sociology. In particular, in terms of volume and substantial content, this task occupies a significant share of her work, although ultimately focused on uncovering existing patterns of inequality and dominance within the discipline of IR. This research logic made her work a perfect case study on conceptual issues associated with disciplinary hegemony. Moreover, her detailed and all-embracing work with respective kinds of literature within the subfield allows grasping the conceptual landscape of the latter regarding the disciplinary hegemony. Put differently and less vaguely, the fact that she is preoccupied with adequately conceptualizing and operationalizing “diversity,” with the reference audience being the respective part of the disciplinary sociology similarly focused on “diversity,” allows us to see all of the shortcomings associated with the latter concept used as the opposite of hegemony.<sup>624</sup> Thus, it might even be said that with her work, she speaks for a significant part of respective scholarship not by revolutionizing it but by attempting to modify the latter effectively. In this respect, it should not appear strange that before we proceed to the resulting conceptualization of hegemony, we must consider the revised conceptualization of diversity proposed by Wemheuer-Vogelaar since only then does the respective way of thinking about dominance becomes clear.

The tripartite conceptualization of diversity used by Wemheuer-Vogelaar is a modification of the one used by Glaser and Aman in their work on IR journals as a channel

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<sup>622</sup> Ibid., p.12

<sup>623</sup> Ibid.

<sup>624</sup> Wemheuer-Vogelaar 2018, p.3

of scholarly communication within the field.<sup>625</sup> She slightly modifies it to include dissimilarity instead of disparity used by the original authors, based on the premise that the latter is unsuitable for analyzing non-quantifiable parameters.<sup>626</sup> The first aspect of diversity is “variety,” which refers to a typological heterogeneity of the data analyzed; in other words, it reflects how many types or sub-types of an object’s feature we have in a data category. For example, suppose it goes about the IR Theory class. In that case, we have a high “teaching” variety level if the instructor familiarizes the students with six IR theories out of the eight existing, and low levels in case she covers only three out of eight.<sup>627</sup> However, this parameter heavily depends on the top margins set by the researcher, thus necessitating an additional parameter related to diversity, namely evenness.<sup>628</sup> This aspect of diversity pertains to the “weight” of respective typological elements analyzed with the help of the variety indicator, both in absolute and relative terms.<sup>629</sup> An IR Theory class example would be as follows: having six theories covered by the instructor, we will have low evenness levels if one of them is associated with twenty authors in the obligatory reading list, while the remaining five only with four per each of them; or if two are associated with twelve authors each, another two with five and the remaining two with three each. Yet, it is not only that evenness should be considered in tandem with variety, but also, as in the case of the latter, the choice of the standard value affects the resulting outcome of the analysis, thus necessitating a careful selection of the latter value.<sup>630</sup> Dissimilarity, in turn, is substantially a merge of the logic of variety and evenness by allowing an additional category of analysis. In particular, it assesses how many parameters analyzed with the help of the previous indicators belong to one or another larger category. Going back to our analogy of the IR Theory class, it would go about introducing the book/article category; namely, that out of the six theories covered and forty authors mentioned in the reading list of the course, all the reading items are represented by the journal articles with no books being included, thus showing low dissimilarity levels.<sup>631</sup>

Subsequently, Wemheuer-Vogelaar applies this threefold conceptualization of diversity to four aspects of diversity within her analysis of IR journal publications, namely geographical authorship and content diversity, and thematic and theoretical content diversity.<sup>632</sup> The geographical authorship diversity applies to the issue of the location of the author’s affiliation institution. In contrast, the geographical content diversity relates to the regional location of the object of interest in the article.<sup>633</sup> The thematic content diversity, in turn, is associated with the topics covered in articles. In contrast, the theoretical content diversity is linked to theoretical approaches used or discussed within a publication and, by extension, journals.<sup>634</sup> Thus, she arrives at the following three-partite operationalization of diversity. For the geographical authorship diversity indicators, we speak of variety as the number of countries of affiliation present in a journal(s), evenness, in its turn, appears as a proportion of articles per country of affiliation. In contrast, dissimilarity is the authors’ ratio in the Global South and North.<sup>635</sup> The geographical content diversity consists of variety as the number of regions under study in the article/journal, evenness as the portion of the number of articles per region under investigation, and dissimilarity as the ratio of the studied region’s location in either the Global South or Global North.

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<sup>625</sup> Ibid., p.28; Glaser and Aman 2017 cited in Wemheuer-Vogelaar 2018, p.28.

<sup>626</sup> Ibid.

<sup>627</sup> Ibid

<sup>628</sup> Ibid., p.29

<sup>629</sup> Ibid.

<sup>630</sup> Ibid., p.30

<sup>631</sup> Wemheuer-Vogelaar 2018., p.31

<sup>632</sup> Ibid., p. 33-34.

<sup>633</sup> Ibid., p.33

<sup>634</sup> Ibid.

<sup>635</sup> Ibid, p.40

### 3.1.1. Empty Gramsci, problematic hegemony, and a leading class.<sup>636</sup>

The current subsection returns to Helen Turton and her work on the various ways disciplinary dominance/hegemony occurs.<sup>637</sup> While reviewing the state of the literature on disciplinary dominance, she devoted little attention to the *substantial* meaning of dominance and hegemony. She referred to some semantic differences. However, ascribed the latter to the author's specific understanding of the same phenomenon, namely disciplinary dominance.<sup>638</sup> Her tautological usage of dominance in her explication of these differences is pretty telling: when one uses hegemony, it most likely goes about consensual domination. In contrast, dominance alone refers to the coercive instance of domination.<sup>639</sup>

Apart from the suspicious tautological usage of the dominance-hegemony couple, there is not much to argue against thus far. However, the problematic character of such an approach becomes more evident while the argument unfolds further. Instead of involving herself in a seemingly "pointless debate" on the substance of disciplinary dominance, she highlights the lack of precise and stabilized conceptualizations of the latter concerning the specific realm of scholarly activity.<sup>640</sup> As a case to the point, she brings in Hoffman with his occasional switching of conceptualizations ranging from the ability to define the subject matter of IR and dominance of Realism to the adoption and promotion of positivism.<sup>641</sup> Moreover, she criticizes the existing scholarship for the "yes-or-no" logic approach to the issue of disciplinary dominance. At the same time, for her, it seems that it is not only impossible but also counterproductive to pose the question in such terms: an IR community, in our case, the US IR community, might be dominant in one sense and way, while not being dominant in another.<sup>642</sup>

All of this, according to Turton, is the result of the aforementioned conceptual ambiguity concerning disciplinary dominance; even more important, this situation leads to the overlooked character of the opposing disciplinary dynamics, namely pluralism and internationalism.<sup>643</sup> Therefore, we are starting to approach the primary focus of Turton's interest in disciplinary dominance, namely the variability of forms and degrees of dominance as a channel for counter-tendencies such as the pluralism and internationalism mentioned above.<sup>644</sup> In this way, it might even be said that despite the title of her book, and the conceptual fixation on dominance, her work is more preoccupied with tracing the patterns of homogeneity and heterogeneity within the discipline – dominance serves as a conceptual strawman, or the "launch pad" rather than the "ultimate destination" for her research. However, all of this is too shaky, superficial, and easily ascribed to the author's misunderstanding of the conceptual linkages and interrelations due to his lack of expertise or proficiency in academic English. The best way to prove that Turton's reading of disciplinary hegemony/dominance is problematic is to turn to the moment she moves on to propose her conceptual framework for analyzing disciplinary dominance. Although the moment when she refers to hegemony as a form of dominance, even though earlier on she effectively equalized the two, might appear to some readers as confusing in the best case and suspicious in the worst, this is still not the primary point.<sup>645</sup>

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<sup>636</sup> This is an allusion to the phrase used by Helen Turton (2016) in an attempt to explain her reading of Gramsci and neo-Gramscianism for the purposes of the analysis of disciplinary dominance/hegemony in IR.

<sup>637</sup> Turton 2016

<sup>638</sup> *Ibid.*, pp.5-7.

<sup>639</sup> *Ibid.*, p.7

<sup>640</sup> *Ibid.*, pp.7-8

<sup>641</sup> Hoffmann 1977 cited in Turton 2016, p.8.

<sup>642</sup> Turton 2016, p.8.

<sup>643</sup> *Ibid.*, pp.8-9.

<sup>644</sup> *Ibid.*, pp.9-10

<sup>645</sup> Compare Turton 2016, p.7 and Turton 2016, pp.11-12

The essence of Turton's own "reading" of hegemony becomes evident when she clearly states to use the "Gramscian" framework for understanding specific forms of the US IR community dominance.<sup>646</sup> Hinging on classical definitions of hegemony found in the secondary-sources literature on the Gramscian hegemony and its application within the realm of IR theory, namely neo-Gramscianism, she claims to transpose it to the realm of the disciplinary self-perception.<sup>647</sup> However, the whole "transposition" accounts for no more than a simple analogy between the Gramscian leading (hegemonic) class and the US IR community, thus making it problematic to understand, without any further elaboration, how it allows getting an idea of the interplay of material and ideational disciplinary factors and structures, and the interplay of the disciplinary agency and the latter structural dimension.<sup>648</sup> In addition, it becomes problematic to trace the "Gramscianity" of this approach to hegemony since the operationalization of this Gramscian view of hegemony comes down to a simple relisting of the conventional conceptualizations of disciplinary dominance mentioned earlier in her review of the literature and covered in the first subsection of this work.<sup>649</sup> Her initial "disaggregation" of disciplinary dominance ultimately leads her to "reassemble" all the resulting elements in the same unified whole, now under the banner of the Gramscian hegemony.<sup>650</sup> The substantive difference between other authors' "occasionally used" notion of disciplinary hegemony and her own is unclear. The only difference between her conceptualization and those she criticized is that the former includes the latter.

Moreover, another strange contradiction might be found concerning Turton's operationalization of dominance/hegemony. While at the beginning of her work, she assumes her Gramscian approach to disciplinary dominance, she states that the "presence" of the US predominance in at least one of the indicators mentioned will tell us that the US IR community is dominant within the discipline, however, by the end of the work, namely within the conclusion section, she readily acknowledges that the US IR community is "dominant" according to at least two of her operationalizations of dominance, and concludes that overall the discipline is "non-hegemonic" to paraphrase Holsti and Smith.<sup>651</sup> This is a strange conclusion if one keeps her earlier claims in mind. The only way one can positively assess this conceptualization is when one looks at it in terms of the aggregation of indicators of hegemony, i.e., before Turton, whenever one spoke of disciplinary dominance, it was one or two factors mentioned as being primary elements of upholding the latter, and she was the first to bring those together and empirically test them. In this respect, namely in practical terms, her work deserves excellent praise and inclusion in every IR Theory class reading list; however, conceptually, it does more harm than good.

What was the Turtonian hegemony then if it was not based on Gramsci? Ironically, Turton followed much more mainstream IR Theory thinking than she may have wanted. The first red flag concerning Gramscianity of her hegemony is found in her statement regarding the domain-specific presence of dominance, namely when she speaks of disciplinary dominance being evident in one realm and absent in others.<sup>652</sup> This analogy is quite telling and refers mainly to the early neo-institutionalist claim regarding the non-fungibility of power, namely that if one possesses great military capabilities, it does not mean that it will be possible to use those capabilities for achieving desired outcomes in other domains of the international. Even more ironically, if one goes further with this logic,

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<sup>646</sup> Turton 2016, pp. 11-12

<sup>647</sup> *Ibid.*, pp.11-12; Mittleman 2000, p.167; Bieler and Morton 2004, p.87; Cox 1981, 136, 139; Germain and Kenny 1998, p.17 cited in Turton 2016, pp.11-12.

<sup>648</sup> *Ibid.*, p.11

<sup>649</sup> *Ibid.*, p.12

<sup>650</sup> *Ibid.*, p.11

<sup>651</sup> Turton 2016, p.111; Holsti 1985; Smith 2001

<sup>652</sup> Turton 2016, p.11

it turns out that even within the neo-liberal perspective, the domain-specific character of power does not limit the power conversion; instead, it becomes more about gaining the net effect of possession predominance in various issue domains, which might be used to get leverage in a different domain.<sup>653</sup>

Another implicit proof that the Gramscianity of her hegemony is primarily empty is that while she is focused on the issue of gate-keeping practices operationalized through the activities of the journal editors, she does not even mention the Gramscian concept of intellectuals, be those organic or traditional.<sup>654</sup> However, if one proclaims the US IR community to be analogues to the Gramscian dominant class, avoiding the “naming” of the agents of the dominant class’s hegemony is quite paradoxical since one of the essential innovations of Gramsci was to explicitly state the agential mechanism of maintaining and achieving hegemony by a particular class, that of having auxiliary strata of intellectuals. Moreover, and luckily for the sociology of IR, the notion of intellectuals doesn’t stand on the kind of activity but rather the function performed by the latter: in the case of Gramsci, it was “molding” consent, and in the claim of Turton, with great reserve, it might be defined as “excluding” discontent and “deviation.” To make the disciplinary hegemony a Gramscian one, this has to be put on the proper conceptual ground. On top of this, although Turton criticized “earlier” approaches to conceptualizing dominance based on their “yes-or-no” logic of formulation, she applies the very same reason, although now being “disaggregated” into three “no” and two “yes,” which ultimately leads to the general “no.”<sup>655</sup> The trick here, which assumably serves to justify her claim for tracing the interplay of material and ideational factors, is that those “no” belong to the theoretical-methodological conceptualization (i.e., immaterial) and “yes” to the institutional and publishing output conceptualizations (i.e., material).<sup>656</sup> In this case, it goes against the logic of the Italian revolutionary’s understanding of the concept. In particular, as mentioned earlier in this work, the Gramscian hegemony unfolds in the dialectical unity and mutual reinforcement of coercion and consent, material, and ideational factors, with none of the two having decisive importance alone in any of the social realms. Moreover, while there might be some reservations concerning the “monopoly on the type of predominance” concerning a conceptual couple of the state and civil society,

Overall, one may proceed by listing what is missing and wrong with this conceptual transfer of the Gramscian hegemony to disciplinary sociology. However, there is only one additional point that necessarily requires further clarification, namely the one of the “leading class analogy.”<sup>657</sup> First of all, it concerns the precision and applicability of this analogy. Gramsci first spoke of hegemony in domestic terms and used it to explain the stability of the societal order, which essentially was exploitative and unjust concerning the majority of the respective social formation.<sup>658</sup> In this sense, it was about how an exploitative minority can preserve the status quo despite the self-evident burden of exploitation arbitrarily imposed on the majority and, even more critically, with the consent of that majority.<sup>659</sup> Thus, when speaking of hegemony, it goes not so much only about the type of power or domination per se but rather the kind of societal order, which is based on contradictions and exploitation but preserves its stability, functionality, and ability to evolve.

Moreover, Gramsci’s and Cox’s stance on the nature of international hegemony, the closest one to the analogy of Turton, has evident domestic roots; in particular, it goes

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<sup>653</sup> See section 2.2.1

<sup>654</sup> Turton 2016, p.118-140.

<sup>655</sup> Turton 2016, p.111.

<sup>656</sup> Turton 2016, p.8.

<sup>657</sup> Ibid., p.11.

<sup>658</sup> See section 1.2.1.

<sup>659</sup> Ibid.

about, first of all, establishing the order of consensual domination at home, meaning that there is a specific model of this order, both in economic, cultural and political terms, which later on is being “imported” or “borrowed” by the aspiring to dominance class of another society.<sup>660</sup> In the case of Gramsci, internationally, we would speak of the arithmetic sum of national capitalist hegemonies which evolved through the metaphor of “borrowing” and “import,” while in Coxian and general neo-Gramscian terms, it would go about a different emergent structure creating a higher-level order of domination, not limited to, although based within and on the domestic exploitation and consent molding.<sup>661</sup> In respect, it might be reasonable to ask what is meant by Turton if she had to speak about disciplinary dominance in such terms, the latter or the former analogy. Yet, the answer is evident – none of the two suits her understanding of hegemony.

The reason for this is the following: she approaches the “international” dimension of the discipline (if there is any at all) in the most vulgar-mainstream “billiard ball/black box analogy,” namely that of IR communities, akin to states in realism, possessing various “capabilities” and “resources,” in our case, the size of the IR community (demographic resources), its scholarly output in the form of articles (economic/military resources), and respective theoretical and methodological frameworks (ideology).<sup>662</sup> And those communities “collide” trying to “dominate” others, and this domination is measured in terms of aggregate indicators associated with specific operationalizations of dominance. In the case of Realism and Liberalism, the arena for this collision is either the battlefield or the market; in the case of the sociology of IR, it is a journal or conference. The only difference is that due to the specificity of the scholarly realm, those factors which are downplayed by Realism, such as morals and beliefs, i.e., immaterial elements, are treated on an equal foot with those of material kinds like economic capabilities and military might in Realism, theories and epistemologies are treated as goods or ideologies to be “sold” or “internalized/emulated” internationally. In such a view of hegemony and the “social” dimension of the discipline, there is no space for internal domestic dynamics, which might impact the discipline's international dimension.

Moreover, the channels of interaction between the IR scholars located in various IR communities are thought of as being fixed to their community, akin to the state in Realism acting as the primary “expressor,” “mediator,” and “suppressor” of domestic dynamics.<sup>663</sup> However, there is an additional problem with this analogy. Namely, there is no “state” or any “state-like” structure within IR, or is it there? Although one could argue about the particular assignment of correspondence in the abovementioned analogy, namely that the publishing output of an IR community is more of military capability, while theories and methods are closer to the economic potential, those are more specifics of a heuristic kind. What is essential is that disciplinary dominance is treated the same way as dominance in the interstate system. What is even more important, it is thought of in terms of a particular theoretical perspective of the IR itself. What is it if not an excellent example of the disciplinary US hegemony, in case one takes the neo-neo couple to be directly associated with the US IR community? What is a better sign of disciplinary hegemony if, instead of aligning the disciplinary perception of the international with the particular theoretical tradition of the field, one thinks of the discipline itself in terms of this tradition?

Thus, when Turton speaks of the Gramscian hegemony and the US IR community as a leading class, the reference to Gramsci is more of reverence to the “reflexive” aspirations and emancipatory inclinations rather than any substantial conceptual inheritance. In terms of her conceptual imagination, she is closer to the Waltzian, if not

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<sup>660</sup> See sections 1.2.1 and 2.4.1.

<sup>661</sup> See section 2.4.1.

<sup>662</sup> See section 2.1.2

<sup>663</sup> See section 2.1.2



Gilpinian, Realism rather than the Italian or his Canadian and Dutch “international” descendants.<sup>664</sup> To make this approach at least marginally Gramscian, one has to think of the US IR community, or any other IR community aspiring to dominance, as the one operating within a kind of global “scholarly” social formation, or at least a variety of separate “social formations” defined on its position within the “academic” relations of production. The latter formations would have been characterized by their internal stratification, alliances, conflicts over positions of power, “ideological” compromises, and dynamics of restoration vs. revolution.<sup>665</sup> And what is more important, those “national” formations or a single global “scholarly” formation should be based on specific logic and pattern of “intellectual” production, which, in its turn, if conceptualized properly, might tell us way more about who, and why dominates the discipline “internationally” than dozens of bibliometric studies on theoretical pluralism and national diversity of the field.<sup>666</sup>

Finally, and as a continuation of the previous point, some attention must be paid to another issue, neo-Gramscianism, and Turton’s understanding of hegemony. Specifically, Gramsci and neo-Gramscianism talk about ideational domination, concerning creating the universal ideational plain, but not the totalitarian uniformity of views and approaches.<sup>667</sup> Moreover, if one pays more attention to Gramsci, even in the secondary-sources comments form, the former developed his “hegemonic” framework as a conceptual opposite to the complete/totalitarian uniformity and coercive control, as evidenced through his comparison of the “position” of the state and civil society in the West and the East.<sup>668</sup> Put differently, hegemony, in its ideational dimension, presupposes the inability to imagine a radical alternative to the existing order rather than an ideological homogeneity; the latter, in turn, is closer to the ideological dictatorship of the proletariat found in Lenin rather than Gramscian hegemony.<sup>669</sup> To elaborate, the Gramscian hegemony assumes that contradictions, conflicts, and even patterns of unjust inequality within the hegemonic order are acknowledged; however, the subjects of hegemony locate the source of the latter not within the normative or economic foundation of the existing order, but rather ascribe them a momentary and situational character, mostly stemming from the deficiencies of “putting into practice” the ideal-typical models contained in the normative foundations of the order, i.e., treated as deviations from the normative core of the order, rather than the result of its essentially unjust character.<sup>670</sup> In this sense, hegemony expresses itself not in the uniformity of views or the predominant distribution of specific opinions among the populace but quite the contrary – a complete diversity of views different in all possible respects, but one, namely the core elements of the exploitative order, for example, private property or credit-based economy.<sup>671</sup>

In this sense, as was already mentioned in the previous subsection, although now this issue is framed with a direct reference to Gramsci and neo-Gramscianism, uniformity of the theoretical and methodological uniformity of the discipline, especially regarding the community-level aggregate indicators in its structural distribution form, is not the best way to “measure” the disciplinary dominance.

### 3.2. Hegemonic analogies

In terms of its purpose, this sub-chapter might be considered the structural apex of this work: this is so since it undertakes the task of fulfilling the promise stated at the very

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<sup>664</sup> Compare subchapter 2.1 and 2.4

<sup>665</sup> See section 2.4.1

<sup>666</sup> See section 1.3.2 and 2.4.2

<sup>667</sup> See sections 1.2.3. and 2.4.1., 2.4.2.

<sup>668</sup> See section 1.2.1

<sup>669</sup> See section 1.1.2.

<sup>670</sup> See section 1.2.4.

<sup>671</sup> See section 2.4.2.

beginning of this work and recapitulated several times throughout the previous chapters, namely the one advancing the state of the disciplinary sociology of IR. This advancement was promised to be delivered through a “reversed” logic of scholarly investigation, i.e., where we start with the assumption that theoretical concepts have a paradoxical relation to reality. Paradoxical in that they not only reflect it when formed and applied with a specific theoretical context but also grasp and preserve something beyond what was intended by its author. According to this logic, one can start with the concept of hegemony as understood by the Italian revolutionary Antonio Gramsci and hope for its usefulness in realms of research beyond the mere stability of the bourgeoisie order.

As such, this approach to conceptual innovation has no serious shortcomings, apart from the limitations imposed on one’s “sociological imagination.”<sup>672</sup> The latter term usually refers to one’s ability to bring together personal experience with the theoretical consideration of the macro-level and arrive at a more coherent picture of the social than from the former or the latter perspectives. Unfortunately, this subchapter could not fully employ only the “imaginative” element of the former heuristic tool due to several factors. First, developing a coherent and non-contradictory conceptual transfer is challenging without falling into either simplicity or excessive complexity. Paradoxically, this subchapter succeeded both ways. Second, there is a dilemma of either following the “script” of the source or using it as a mere starting point for your assumptions. The former might lead to situations of conceptual tautology, coupled with a suspicious lack of originality of interpretation about the source of borrowing, and mere implantation of the “alien” conceptual framework into one’s subfield, while the latter might lead to the usage of the original as a point for simple prestige reference, i.e., protecting one’s views and assumption with the help of commended names and theories, which might have little in common with the latter assumptions. Since the last option was successfully “taken” by various authors writing within the realm of disciplinary sociology, this subchapter is at ease with doing the “dirty work” of following the “script.”

To draw the reader’s attention one more time – this is not a piece of work on theory or an attempt to build a comprehensive and coherent conceptual framework concerning disciplinary hegemony. Instead, this is an exercise in “conceptual imagination” with its goal of drawing analogies and parallels that might hypothetically advance our understanding of the issue of disciplinary domination. In this sense, its primary task is to brake, or in more fashionable parlance, destabilize the existing framework of the subfield’s understanding of disciplinary hegemony and the auxiliary conceptual apparatus linked to the former notion. Otherwise stated, it seeks to show that there is something more about disciplinary dominance than simplistic conceptual pairs of coercion and consent, west and non-west, global south, global north, and so on. The price one pays for this commendable but risky endeavor is the parsimony of argumentation, coherence of narration, and in the worst case, overall quality of the work. Yet, since organized scholarship, i.e., academic discipline, is a collective “enterprise,” with costs and benefits unequally distributed across the community, someone must be taking the burden of doing the dirty job of “paving the way” for others. Before someone can build the theoretical edifice or at least develop the comprehensive plan of the latter, there should be someone making the “caricaturistic” sketch of the surrounding landscape. Thus, what follows is a caricature of disciplinary hegemony developed to inspire others.

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<sup>672</sup> Mills 1959

### 3.2.1. Non-IR disciplinary hegemony

#### 3.2.1.1. Disciplinary state-society, intellectuals, and consent

When we reach Gramsci, we should remind the reader of a specific particularity about his view of hegemony, namely its character of the stable form of rule not being susceptible to shocks and conflicts characteristic of other forms of dominance and exploitation.<sup>673</sup> In this way, we break away from any specific type of power being its basis and any unique agent associated with it.<sup>674</sup> As mentioned in the respective subsection of this work, Gramsci effectively reverses the logic of hegemony, compared to his predecessors, from a prescriptive to a descriptive one.<sup>675</sup> Thus, one has to go down the same road to derive at least partially and conditionally Gramscian understanding of the disciplinary hegemony.

In particular, following Gramsci, disciplinary hegemony cannot be and should not be seen as purely coercive (whatever understanding of disciplinary coercion one comes up with) nor equalized with consent *per se*.<sup>676</sup> Thus, we must always speak of disciplinary hegemony as a combination of the two. Since Gramsci himself did not provide a specific ratio of the two elements of hegemony, it is open for interpretation and definitely cannot be conceptualized within this work. However, to compensate for this analytical impotence, we could add that on an aggregate level, the two are roughly equal, and the variance of their ratio is context and case-specific. All in all, disciplinary hegemony is exclusion and emulation, at least using the conventional language of disciplinary sociology, but not any of the two taken separately.

Although we cannot precisely define the ratio between the two, we could try representing the operational arenas of the two, hoping that it brings similar results.<sup>677</sup> Again, conceptually, we can provide a list of specific disciplinary institutions in charge of either exclusion or emulation enhancement. Instead, it suffices to come up with notions of “disciplinary civil society” and “disciplinary state,” the latter pertains to the institutionalized disciplinary-professional hierarchy. At the same time, the former is assumably free from it. In this formulation, the disciplinary state easily fits the research-educational structure of IR, namely various universities, institutes, and think tanks. It is characterized by a particular departmental organization of the disciplinary process and codified rules for research or teaching, on par with a clearly defined framework of penalties and promotions, both material and status-like. Put differently, it refers to the space of formal practicing of the discipline, as opposed to the disciplinary civil society, where hierarchy, although present, is not explicit and institutionalized; rules and norms are instead just agreed on rather than formalized and codified. The framework of penalties and rewards is not clearly defined in its material and status forms. Moreover, to this, we can add, as an allusion to the Gramscian linkage of coercion’s predominance within the state, that the disciplinary state mainly operates with the help of material penalties and rewards. In contrast, civil society works with status and prestige motivation.<sup>678</sup>

In this way, the disciplinary state neatly fits the university, research institutions, and think tanks framework since this is where IR scholars “make” their living, are promoted or dismissed, and have to follow explicit and codified rules of conduct. The disciplinary civil society, in this way, relates then to everything “else” where there is no solid institutional hierarchy or code of behavior, and penalties and rewards are primarily about one’s status and recognition rather than motivation in material terms. Simplified and reduced almost to

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<sup>673</sup> See section 1.2.1

<sup>674</sup> *Ibid.*

<sup>675</sup> *Ibid.*

<sup>676</sup> *Ibid.*

<sup>677</sup> See section 1.2.2

<sup>678</sup> *Ibid.*

an absurd line, the former is the disciplinary arena in which you have to participate if you want to remain in the profession and make a living, while participation in the latter is up to you.

On top of this, as in the case of the Gramscian conceptual universe, the border between the two is quite vague, and quite often, the two pervade each other or can even be conceived as a single whole.<sup>679</sup> However, there is still a crucial point regarding the two: the disciplinary civil society is the arena where one gains “resources” of recognition and prestige for increasing one’s power and improving one’s position within the disciplinary state; it is also the place where disciplinary “ideologies” meet and collide before acquiring predominant role supported by the framework of the disciplinary state — the latter sense points to another analogy, yet this time of economic character. The disciplinary state might be conceived as a place where disciplinary knowledge is produced and subsequently institutionalized. However, its “commodification” and “valorization” occur within the disciplinary civil society. Only after the two processes took place the latter “formalizes” and “inscribes” its results into the institutional framework of the discipline.

Yet, this analogy applies only to the domestic disciplinary context since Gramsci's formulation of hegemony had a prominent domestic character.<sup>680</sup> In an attempt to give it more of an international flavor, we might follow Gramsci and assume that internationally the discipline unfolds as a collection of various disciplinary state-civil society complexes. The international disciplinary dynamics of dominance apply to the relations between elements of these complexes. Luckily, there is a straightforward way to make it truly international, namely through the notion of global/international disciplinary civil society; however, this analogy, both in terms of its fit and appropriateness, relates more to the case of neo-gramscianism; thus, it will put forward in the respective subsequent subsection.

Coming back to Gramsci and disciplinary hegemony, we may turn toward two mutually related notions: the historical block and the intellectuals.<sup>681</sup> The first, within the context of the sociology of IR, might pertain to a clearly defined subject matter of the field, on par with the corresponding theoretical and methodological traditions. Unfortunately, the lack of disciplinary cohesion is a parable in tongues among IR scholars; thus, keeping Gramsci’s definition of the organic (hegemonic) historical block in mind, we cannot apply the latter to the case of IR, at least in the first sight reading.<sup>682</sup> However, suppose one steps away from the literal reading of the ideas of the common social goal and worldview as the primary feature of the organic historical block. In that case, we may try another shot for this analogy. In particular, despite the abovementioned lack of disciplinary agreement concerning the field’s subject matter, primary methods, and so on, there is still something that makes scholars explicitly designate themselves as IR scholars: whether this self-identification stems from the departmental structure of the respective institutions they are part of, or their view of the unique and separate object of study, or anything else one can think of, is not essential since this self-identification is a disciplinary reality, and we are, at least for now, not interested in specific roots and basis of such an identification.<sup>683</sup> Taking disciplinary self-identification as a euphemism for the disciplinary *organic unison*, we might speak of the hegemonic historical block of IR without explicitly formulating its context and the unifying idea.

However strange the above statement might sound, its primary importance stems from the degree of cohesiveness in the intradisciplinary relations, however small it might be, as compared with the earlier stages of the disciplinary history when it was about a

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<sup>679</sup> Ibid.

<sup>680</sup> See section 1.2.1

<sup>681</sup> See section 1.2.2.

<sup>682</sup> Ibid.

<sup>683</sup> See section 1.2.3.

dozen of departments and a hundred or so scholars around the world associating themselves with IR.<sup>684</sup> Moreover, it is not just about numbers, since for Gramsci, it was about the opposition of the organic unity to the mechanical.<sup>685</sup> In this sense, we speak of the qualitative change in the way those previously unconnected and rarely interacting units (IR scholars, IR school, etc.) are now enjoying, however small, a degree of cohesion and common disciplinary purpose.

In this respect, the reasonable question arises, namely, how this degree of disciplinary unity is achieved, and what are the sources and mechanisms of it? While the question is of great importance and interest, Gramsci hints at it slightly differently, pointing at the agents of this unity, namely intellectuals. Thus, when we speak of disciplinary cohesion as an organic historical block, we should discuss disciplinary intellectuals. However, one might reasonably argue how one can talk about them in the field, which is by its nature the one of intellectual “production.” Luckily, the Gramscian intellectual is a functional notion rather than substantive, i.e., those of the disciplinary kind should be defined following their function of maintaining disciplinary cohesion rather than by the nature of their scholarly work (be the latter realist or poststructuralist).

Moreover, following Gramsci further, we should point to their sub-function of maintaining the linkage between the disciplinary civil and political societies. Interestingly, concerning the abovementioned definitions of the two, it turns out that each IR scholar can be an intellectual in the Gramscian sense. In this way, we might spot a possible contradiction – if the whole discipline is “populated” with cohesion molders, i.e., hegemonic agents/subjects, who are left to be the objects of this hegemonic dynamics? The solution to this problem is an additional feature of the intellectuals, namely their function’s “floating” character. Put differently, the role of the disciplinary intellectual is not fixed and not linked to a particular individual scholar (however, there might be cases where an individual IR scholar, due to the specifics of his professional activities, acts *mainly* as a cohesion molder). Thus, for each IR scholar, whenever she presents at a “Feminist theory talks” EISA conference roundtable or the “Covid-19 and Geopolitics” seminar organized by the Russian Institute of Foreign Affairs, she uptakes the disciplinary intellectual role.

Still, another question arises, namely of how cohesion maintenance occurs if each IR scholar has diverse “views” on how the discipline should be done. In this situation, we have two alleys as a way out of this problematic context, the one conventionally implied by the normative strand of the sociology of IR and the one which we can derive from looking at the typology of the Gramscian intellectuals. The first would point to the element of the hegemonic worldview present in each IR scholar’s perception of the desired form of the discipline, which is unconsciously “implanted” in her research “preferences” through the mainstream theorizing, conceptual and methodological frameworks.<sup>686</sup>

The second, in turn, would point toward two types of disciplinary intellectuals: organic and traditional. The latter subtype, simplistically transplanted to the sociology of IR, would pertain to IR scholars whose disciplinary identity and status was shaped and granted in the previous historical block, mechanical or hegemonic, and who assume a “distanced” attitude toward the current state of the disciplinary mainstream, however, unconsciously helps maintain the current disciplinary block, due to the implicit presence of the above elements in their disciplinary “outlook.” The latter “distance” is effectively neutralized by the constraints of the disciplinary state, either through a “rationalized” and explicit acceptance of the requirements and disciplinary fashions or through the implicit tacit non-interference. The former sub-type, in its turn, would be linked to those IR

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<sup>684</sup> Ibid.

<sup>685</sup> Ibid.

<sup>686</sup> See section 1.2.4.

scholars who consciously subscribe to the hegemonic project of the discipline and self-identify themselves with the latter project. The two have slightly different functions in maintaining disciplinary cohesion. The traditional type acts mainly as the “prestige capital” or “recognition audience” for the rising hegemonic disciplinary project, i.e., support, or at least a lack of fierce criticism from a seemingly neutral and “respected” IR scholars, is crucial for the success of the former project. The former sub-type expresses its cohesion function differently, namely in developing, adapting, and maintaining the disciplinary project so that while preserving its core tenets, it appeals to the most significant number of scholars participating in the discipline.

Finally, we approach the last useful analogy derived from the Gramscian conceptualization of hegemony, which concerns disciplinary common sense, contradictory consciousness, and passive consent. The former two are the composite elements of passive consent; they are the two forms passive consent takes. One cannot say that the notion of common sense is absent from the sociology of IR; however, what deserves attention is its conceptualizations.<sup>687</sup> For example, disciplinary common sense is usually regarded as the most basic and profound element of the disciplinary identity, and there is nothing tremendously wrong or superficial in this conceptualization.<sup>688</sup> Yet, it misses quite an essential point concerning its understanding by Gramsci.<sup>689</sup> Updated and “modified” in the Gramscian fashion, disciplinary common sense would pertain to views and opinions held by an IR scholar *outside* her issue-area expertise, not those within the latter realm. This difference in conceptualization is crucial in making it adequately Gramscian since then it links itself with and allows for not only the notion of passive disciplinary consent but also the one of contradictory consciousness. The rationale behind this modification is that the most convenient area for consent molding is not where an IR scholar possesses the expertise but where she does not; however, it is still linked to her professional activities.

The point quite often missed by those speaking of disciplinary dominance is that the Gramscian notion of disciplinary common sense would pertain to the whole sphere of *uncritical attitudes*, which aim at constructing the general picture of the discipline and its object of interest, however, affected by the fragmented and mutually exclusive character of the latter attitudes, thus allowing for the contradictory consciousness. The latter, in its turn, would pertain to a situation when an IR scholar is aware of a specific disciplinary mismatch, bias, or issue and acts accordingly, either in terms of voicing their discontent with the state of affairs within the discipline, or the solution proposed by the mainstream, however, not being able to properly conceptualize it due to the absence of an adequate vocabulary. The case of Helen Turton and her analysis of disciplinary dominance is quite a telling example of the contradictory consciousness: she “feels” the mismatch between the normative statements and actual disciplinary “reality”; however, she lacks an adequate vocabulary for conceptualizing her subject of scholarly interest, thus instead of using the thoroughly Gramscian understanding of the concept, she equates it to consent since the dichotomy of consent and coercion, on par with a corresponding couple of Realism vs. Gramsci is a part of the disciplinary common sense.<sup>690</sup>

In such a way, we finish this subsection by showing that the Gramscian understanding of disciplinary hegemony conceptually finds its basis and ends with the notions of common sense and contradictory consciousness as two elements of disciplinary passive consent. The latter, in its turn, is the basis of any non-material disciplinary dominance.

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<sup>687</sup> See section 1.2.1

<sup>688</sup> Spegele 1984

<sup>689</sup> See section 1.2.4

<sup>690</sup> *Ibid.*

### 3.2.1.2. Discursive disciplinary hegemony and IR as a world system

The concluding subsection of this subchapter is preoccupied with deriving helpful analogies from two non-IR hegemonic traditions, one associated with Laclau and Mouffe and another with Wallerstein and Arrighi. We start with hegemony in Laclau and Mouffe. This choice is due to their theoretical framework, which neatly suits the tone already present at the end of the previous subsection, namely that of disciplinary common sense and the hegemonic “control” over its crucial elements.

Following them in their assumption of the material and non-material, i.e., linguistic factors in shaping social and political phenomena, we might conceive the discipline of IR in similar terms, with the whole of the non-material disciplinary elements, such as theories, methods, epistemologies, and even speeches given by IR scholars as comprising a single whole, namely the discursive totality, which in its turn exists in the disciplinary field of discursivity.<sup>691</sup> Although “signs” populating this field are conditioned by their relation to each other, similar to the case of political discourses, they are never stable. IR in its whole disciplinary discursive emanation or one of specific theories and traditions is only partially fixed. In this sense, the discursive field of IR is an assemblage of various statements regarding differences present in this part of the social reality one refers to as the international. The IR discourse, in its turn, is an attempt to tighten those together under the “banner” of a specific logic.<sup>692</sup> The result of this successful stabilization might be analogically referred to as a disciplinary moment.<sup>693</sup> Similarly, one can analogically refer to the “production” process of disciplinary moments as “disciplinary articulation.” This fixation as a moment, and as an articulation, of various individual elements of the disciplinary discursive field implies an exclusion of all other possible alternatives through assuming a specific meaning for the former.

Before we proceed with our logic of analogy further and illustrate the relation it has to disciplinary hegemony, we have to remind the reader of another notion from the above-described discourse theory. This notion is one of the empty signifiers. The latter claims disciplinary universality by signifying the very lack of this universality. Put differently, with its help, we can say what something *is not* by identifying various elements and aspects of the latter; however, we cannot say what it *is*.<sup>694</sup>

In this sense, we can speak of the very disciplinarity of IR. Its respective dynamics, both in its material (read institutional) and non-material (read theoretical/discursive) emanations, appear to be a process of attempting to fill the abovementioned emptiness of its discursive nodal points to make those genuinely universal, i.e., give them universality they “aspire to” but in fact, are never able to attain. As a result, disciplinary antagonisms arise as a justification for the inability to finalize the disciplinary discourse. Disciplinary hegemony, in its Laclauian reading, appears precisely at this moment of antagonism formation within the disciplinary discursive field since, at this moment, a specific differential element of the disciplinary discursive field becomes not just an empty signifier unifying other differential elements but becomes the ideal image propagated for the discipline as a whole. In this sense, disciplinary hegemony is in place we have a vague and

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<sup>691</sup> See section 1.3.1.

<sup>692</sup> Think of various definitions given to one and the same concept by different IR perspectives, and how they acquire meaning only if related to a set of other definitional concepts. Moreover, the same logic might be extended to the whole discipline of IR.

<sup>693</sup> See section 1.3.1.

<sup>694</sup> Think of various concepts “populating” the field of IR. Starting with power, security and coming to hegemony itself. Conventionally, this situation is described as a conceptual disarray and fuzziness stemming from the lack of theoretical “discipline” with the discipline, and an increasing variety of approaches and perspectives. Conceived from the Laclauian perspective, it acquires a new semantic “glitter”, namely not the lack of discipline, or the free market of concepts, colliding and competing for a “better” grasp of the international reality, but more as the abovementioned struggle to embrace as much of the disciplinary field of discursivity as possible, and claim as much of “universality” as possible. Moreover, think of various “ultimate” problems present in various IR traditions, similarly they might be seen as “disciplinary antagonisms” which are called in to justify the inability of the disciplinary discursive formation to attain conceptual universality it claims.

all-embracing concept that acts as the discipline's motto, rationale, research purpose, and object. However, one must remember the multitudinous character of such disciplinary empty signifiers, with each of the “thematic camps,” scholarly groups, etc., having and advancing one of its own.

To illustrate the point, one might think of two examples. The first would be the notion of the “international.” Although a proper conceptualization of it is one of the primary tasks of IR theory, thus far, we do not have any “unity” of views regarding its understanding. Theories, conceptions, and perspectives appear and fade regularly. However, despite this divergence of opinions and the lack of consensus, it still acts as the “unifying” point for various theoretical and empirical questions raised in the discipline, i.e., the concept acquires a constitutive power over its “disciplinarity”—its emptiness keeps the discipline in their entirety. At the same time, think of the notions of “non-Western theory” or “disciplinary delinking” mentioned earlier in this work.<sup>695</sup> Although similarly drawing a line of broad similarity and difference, namely attempting to unite the various existing elements of discontent with the disciplinary state of affairs and differentiate it from the object of discontent, they found themselves not being able to “dominate” and “constitute” IR as “power” does (or war and security).

This example makes us wonder how some claims for universality become dominant while others do not. The first step to a successful hegemonization of the disciplinary discourse is constructing an ideal type under the logic of disciplinary equivalence. In this sense, it pertains to locating the disciplinary “problem,” which used to be approached from different perspectives not unified by the subject-matter equivalence and even putting mutually opposing claims. Although the equivalence is introduced, each element's difference is still preserved, thus keeping the possibility of a counter-hegemonic discourse or a reversal of the previous one. In this way, the broader the universalizing disciplinary claim, the larger its claim to disciplinary universality, on par with internal contradictions and tensions. The second step is about constructing a successful disciplinary antagonism. Namely, a definition of why the common goal formulated in the previous step is impossible to achieve, namely defining the obstacle to its achievement, which also represents the disciplinary identity of the hegemonic discourse and explains the lack of proclaimed universality within it. Thus, we arrive at a moment where the disciplinary discursive field is divided between two disciplinary discourses, with each of them creating its empty signifier, which allows various disciplinary claims to relate themselves to the disciplinary common denominator, henceforth finalizing the third step of disciplinary discursive hegemonization, and forming the complete set of coordinates concerning the goal, problems, and prospects of the hegemonic discourse. Within this third step, we might have additional critical sub-elements for the hegemonic disciplinary project. The first concerns its ability to state its difference clearly and effectively from the previous “state of affairs” and the avenues for modifying it. In contrast, the second pertains to its linkage with the previously existing disciplinary discourses.

The last one, which is finding its base in the pre-existent discursive formations, is crucial for the hegemonic disciplinary project. Put otherwise, it pertains to the situation when a hegemony-aspiring discourse finds an additional ground in those fragmentary, residual elements of the previous discursive formations or those which never took the form of the formation due to the absence of the unifying empty signifier and which constitute the largest share of the disciplinary discursive field. When such a linkage is established, the disciplinary discourse might become truly hegemonic, while without it, it would simply join the discursive field in its residual form. This space of “deconstructed” or “never-formed”

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<sup>695</sup> See section 1.3.1.



formations within the disciplinary discursive field might be called disciplinary common sense.

With the Laclauian analogy for the disciplinary hegemony being in place, we might summarize and generalize the substantive essence of the latter metaphor. In this sense, the discipline of IR and its disciplinary dynamics on par with hegemony and dominance is ultimately about the profession's discursive (linguistic) reality. Thus, the discipline of IR is a field of linguistic statements which are, by definition, empty of any meaning if not connected to others present within it. From time to time, those differential statements are partially fixed through the introduction of one or another theoretical perspective (discursive formation), which claims to embrace the whole discursive field of the discipline.<sup>696</sup> This process takes the form of disciplinary debates, with the underlying antagonism being formed and positions and points of conflict being located. Yet, every IR theory revolves around a central concept, e.g., “power” or “identity,” which aims to connect those previously differential linguistic statements through an essential absence of meaning.

The success of those theories or traditions is based on two crucial factors. First, as was mentioned above, their ability to introduce the most all-embracing concept, which might unite as much of the discipline behind it as possible, and second, ground it in the already existent common sense of the field. Following the Gramscian and Laclauian views, the latter is less of a conventional wisdom but rather a fragmentary and contradictory discursive field. Thus, a disciplinary hegemony or dominance might be perceived as an ability of an IR community to create hegemonic discourses. In its turn, the hegemonic character of discourse is based on the presence of concepts characterized by high levels of semantic equivalency they can establish within the discipline and their reliance on the unsystematic and non-structured “claims” present within the profession.

Thanks to the WST conceptualization of hegemony, or to be more precise, the one of Wallerstein, we can add a layer of analogical conceptualizations for disciplinary hegemony and the very disciplinarity of IR. First, suppose we follow the WST's theoretical framework. In that case, we cannot speak of the “international” dimension of IR as being composed of various functionally equivalent entities, such as the IR community. To be more precise, we still can employ this unit of analysis; however, with an understanding that neither structurally nor processual, it appears to be the primary element of the discipline in its international dimension. Instead, it makes sense to speak of IR as a global disciplinary system characterized by a specific typology, structure, processes, and dynamics.

In terms of structure, we should speak of IR as based on a specific mode of disciplinary production, which unfolds not only as the patterns of academic labor division among various IR communities but mainly as the type of disciplinary regime being in place in specific “geographical” areas of the discipline. Only the latter brings in the scholarly labor division logic, which forms the core, semi-periphery, and periphery structural disciplinary elements.<sup>697</sup> The latter point is quite commonplace in the sociology of IR; however, it focuses mainly on the inequalities of communication or those of scholarly labor division, namely the theory vs. data production, while missing the primary source of this division, namely the abovementioned mode of disciplinary production.<sup>698</sup> Refocusing the source of this division from the type of scholarly “product,” namely theory or data, to one of the systemic modes of production allows for a better understanding of the conventional distinctions between the disciplinary core and periphery. In particular, one might speak of this in terms of knowledge production modes found in the literature on the

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<sup>696</sup> Ibid.

<sup>697</sup> See section 1.3.2.

<sup>698</sup> Ibid.

sociology of science and roughly corresponding to modes based on basic research and separate disciplinarity, applied multidisciplinary, and multiple innovation framework.<sup>699</sup>

Moreover, the distinction between world economies and world empires is a handy analogy for the sociology of IR as well. While most of the accounts of disciplinary hegemony, while applying the core-periphery framework, think of the latter as an analogy for a single disciplinary center or at least as composed of several IR communities, it might be better to think about it in terms of the imperial discipline and world discipline.<sup>700</sup> The first would refer precisely to what is meant by the hegemonic discipline in the sociology of IR, namely a field with a single disciplinary center and various scholarly “cultures” being in place, with each being linked to the center’s “culture.”<sup>701</sup> The second, closer to the current state of affairs, would pertain to IR, characterized by various centers on par with diverse scholarly “cultures.” And within this variety of disciplinary centers and cultures, the heterogeneity of modes of scholarly production, on par with the subsequent division of academic labor, is located, creating the core-periphery disciplinary structure. This analogy proves to be quite promising since more empirically-oriented studies within sociology have pointed to a similar structural pattern; however, guided by a different conceptual logic, they speak not of various disciplinary centers but rather the geographical heterogeneity of the disciplinary center.<sup>702</sup> In addition, we might say that similar to the case of WST and its concept of a world system, it makes sense to speak of IR as, for the first time in its history, a genuinely global discipline, i.e., covering the whole world, as compared with the early stages of its disciplinary development, when it existed in various disciplinary or proto-disciplinary forms across the globe and with minimal disciplinary interaction taking place.<sup>703</sup>

Finally, Wallerstein helps think about the false centrality of the IR community in the analysis of disciplinary hegemony. In particular, following him, we can assume that no IR community can be hegemonic or dominate the world discipline of IR since actual disciplinary dynamics are taking place among the transnationally united groups of scholars rather than IR communities, thus making even disciplinary dominance reserved for the former kind of disciplinary actors. Disciplinary hegemony itself, following Wallerstein, first, would stem from the high levels of scholarly production efficiency of data collection, academic publishing, and fund attraction. Second, it would be based on the propagation of a unifying disciplinary outlook, not of a homogeneous kind, but instead characterized by a high level of epistemological variability. Third, it would pertain to the underlying preponderance regarding material disciplinary infrastructure, namely the institutional framework.

As one might see, apart from the structural modification of the IR’s international disciplinarity and its transnational character, Wallerstein thinking about hegemony is not much of a help for “revitalizing” disciplinary sociology. However, his colleague, Giovanni Arrighi, with his conceptualization of hegemony, seems to be a good case for closing the substantial gaps in the analogy based on Wallerstein. In particular, we come back to a more Gramscian-like conceptualization of disciplinary hegemony yet applied to the international dimension of the discipline. Following Arrighi, we would conceptualize the former as the ability to govern the international dimension of IR, namely, make others follow your path of disciplinary development. Moreover, we would speak about this ability as aimed not at IR communities as a whole, and not in terms of possible benefits for them, but rather as

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<sup>699</sup> Carayannis and Campbell 2006; Carayannis, Thorsten and Campbell, 2012.

<sup>700</sup> See section 1.3.2.

<sup>701</sup> Ibid.

<sup>702</sup> See Turton 2020

<sup>703</sup> See section 1.3.2.

aimed at the scholarly groups dominant in their respective communities, with the promise of an increase in their local disciplinary dominance.

In addition, akin to the case of Gramscian disciplinary hegemony, with Arrighi, we would have two disciplinary arenas, namely the one where the enlargement/contraction or modification of the disciplinary “state” with its institutional structure, codes of conduct and frameworks of status takes place, and another one of a less centralized character, and more of a network-like character, free from the latter’s interference and preoccupied with knowledge “accumulation.” The two conflict across the whole international dimension of the discipline and represent two disciplinary logics, one of expansion and another of accumulation. The disciplinary hegemon has to appease the two with its disciplinary project. The result of this conflict and subsequent hegemonic pacification might be the enlargement and further elaboration of the “popular” discipline, which satisfies dominant groups from both arenas since it serves the purpose of disciplinary growth and introduces into the disciplinary common-sense new epistemic elements and practices. In this sense, it might be said that the recent interest and partial institutionalization of disciplinary sociology, with its normative emphasis on difference and “non-Western” theorizing, is precisely such a “popularizing” move.

### 3.2.2. Bringing back the IR hegemony to the disciplinary sociology

In the following sub-chapter, we focus on the analogies derived from the rereading of IR theory concerning the concept of hegemony and its applicability to disciplinary sociology. Contrary to the previous case, namely one of the “non-IR” conceptualizations of hegemony, it appears to be more suitable for the conceptual transfer within the state-like thinking about the unit composition of the discipline in its global dimension. This is hardly surprising due to the overall state-centric orientation of the IR’s theoretical mainstream. However, even the mainstream’s rereading allows us to draw what is even more critical and related to the previous subchapter, clear-cut and easily applicable analogies for the sociology of IR.

#### 3.2.2.1. Structural-realist disciplinary hegemony?

Although most disciplinary sociology unconsciously applies the structural realist understanding of hegemony, is it possible, and more importantly applicable, to attempt to employ some of the realist theorizations of hegemony in the sociology of IR? Although it has already been mentioned that disciplinary sociology is stuck in structural and aggregate indicators thinking about the discipline, which are most closely associated with the neo-strand of the later tradition, the author of this work assumes that there is still something to be borrowed from this tradition. In particular, it concerns various arguments belonging to the early, i.e., realist version of the Hegemonic Stability Theory.

However, before we proceed to the latter, it makes sense to go through the abovementioned assumptions regarding hegemony found in Realism, yet, now, concerning the disciplinary one. Thus, if one was a Realist and of the structural kind, the latter of an aggressive or defensive type, what would matter then concerning disciplinary hegemony, is the distribution of material capabilities across the international system. In this case, apart from the fact that the primary unit of analysis would be an IR community akin to a state, hegemony, in turn, would be conceived as a particular instance of the distribution of material capabilities in the international disciplinary system. Moreover, it would not be an instance of the dominance of its kind and right but rather a systemic phenomenon arising out of the functioning of the disciplinary system. It would be meaningless to speak of any agency on the side of one community, in terms of its “hegemonic inclinations,” on par with tracing the channels and mechanisms of this disciplinary dominance since the very

“disciplinary power base” would define the outcomes of disciplinary development. Put differently, it does not matter what is contained in one or another theory or what is the distribution of those theories across the international dimension, i.e., an absence or presence of “hegemony” as the one opposed to diversity and plurality, namely lack of disciplinary dominance, since the material structures of the discipline would define the patterns of alignment or opposition to one or another IR community and theories/methods associated with it. Moreover, in Waltzian reading, it would never be possible to achieve such a disciplinary hegemony since other communities would immediately counterbalance the rising hegemon, again not due to their conscious perception of the threat of the discipline’s monopolization in intellectual terms, but rather due to the systemic pressures imposed on them, namely the distribution of material “disciplinary” capabilities.

This simplistic application of the structural Realist thinking to the concept of disciplinary hegemony barely serves any serious intellectual purpose apart from one – namely, illustrating how “strange” if implanted adequately into the disciplinary sociology, with no adjustment to the “intellectual foundations,” agency and interaction specifics of the realm it appears. Moreover, the point regarding the systemic character of hegemony and the automaticity of the systemic logic of hegemony seeking and counterbalancing applies to the “ideational” realm of the discipline, equally showing the problematic character of the approach to hegemony hidden behind the normative claims of the emancipatory strand. Even if we take theories, methods, and epistemologies to constitute the “disciplinary power base,” we face the same problems. It does not matter what this theory/methodology/epistemology is about since the only thing that matters is their “systemic distribution,” which automatically translates into the presence or absence of dominance. The problem with applying this logic, especially to scholarly disciplines, is that it tells us nothing about why, how, and when the dominance occurs; the outcome is always automatic.

Yet there is something more in the Realist thinking about hegemony and dominance overall that was not paid sufficient attention to by the disciplinary sociology and might even be of some use to the latter.<sup>704</sup> It goes about the conceptual patch of “leadership” used by some realists to compensate for the simplicity of the mere “systemic distribution” view of hegemony. In this manner, we return to the realist version of HST and its emphasis on the international public goods provision. In this sense, we would speak of disciplinary order, understood as being composed of various IR communities interacting with each other, although not mutually constitutive and penetrating, like the one where exists an IR community or a group of communities which provides for the international disciplinary public goods. In this sense, the very existence of an order, whether essentially exploitative or free from the latter, heavily depends on the presence of international disciplinary public goods. This would mean that there exists an IR community, the most “powerful” one, of course, in terms of its “material” capabilities which, despite the immediate “burden” imposed on it, provides means and solutions for the stable functioning of the discipline of International Relations in its global emanation.

Moreover, this view on the disciplinary hegemony implies the necessity of the existence of such a community to make the “international” dimension of the discipline arise at all, since if there are various and separated communities with none of them willing to take the “burden” of creating the global field of IR, then the latter does not arise at all. Thus, we should speak of the disciplinary hegemony in the proper realist terms not only as of the material power predominance but also the latter predominance being coupled with

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<sup>704</sup> To be precise, there is clearly some flavor of this kind of thinking with regard to the disciplinary hegemony in some works of on the sociology of IR. However, what is clearly lacking in these accounts is the direct linkage with the parental’s discipline thinking about hegemony, and the respective public goods analogy derived from the realist version of HST.

the willingness to use it, namely, to take the burden of the disciplinary public goods provision. Put differently, it will be about the ability of the dominant IR community to direct its resources to create the latter goods. Yet, the question remains, what are those public disciplinary goods provided by a hegemon?

Here, the realist HST might also help since if the economic-analogy logic is allowed to evaluate the disciplinary diversity, why can it not be extended further, although without the normative protection of the emancipatory claims? What is the international economic stability mentioned by Kindleberger transplanted to the disciplinary sociology realm? Earlier in this work, the resilience of the economic infrastructure was mentioned as another way to speak of international economic stability, and composed of several elements: the first being the existence of a stable and reliable medium of exchange, which also acts as a reliable store of value allowing for the sufficient liquidity, and second the presence of the regime or framework of the protection of the fundamental property rights.<sup>705</sup> Thus, disciplinary analogies come to one's mind quickly. First, we can speak of the stable and reliable medium of exchange being the English language as a *lingua franca* of the discipline coupled with an academic article circulating through the system of scholarly "exchange," namely the peer-reviewed academic journals. Similarly, one can regard positivist epistemology and quantitative methods as the very "medium of scholarly" exchange, allowing an assessment of the "value" of a particular piece of IR scholarship. Although limitations and biases of the latter have been discussed for the last half of a century, none of the IR communities developed a better medium of exchange and value store, neither institutionally nor theoretical-methodologically.

The second, linked to the previous one of the peer review, pertains to the protection of property rights, namely that one of the scholarly cultures concerning the inadmissibility of plagiarism and generally unfair academic practices. The peer-review process allows the quality assessment of some pieces of IR scholarship and ensures that others are not exploiting one's work. Overall, it might be said that in this sense, an IR community might be defined as hegemonic if it had organized a global framework for reassuring the relatively free and fair flow and exchange of scholarly works. Here it goes not so much about something genuinely American concerning the peer review and fights against unethical scholarship but that this specific IR community acts as the most prestigious (read "ultimate") judge concerning the latter issue. This point approaches too close to the Habermasian notion of the "public sphere," namely that of the field of and for discussion, opinion expression, and debate on the "disciplinary matters" of the day.<sup>706</sup> In the case of Habermas, it is separate from the state, although episodically connected to the latter when the need for a source of criticism and reform arises.<sup>707</sup> In the case of IR, we might analogically state the double separateness of the disciplinary public sphere as the primary disciplinary public good, namely its relative independence from each IR community taking part in the international disciplinary order, and the

Yet, this is more of a non-material perspective on this public-good provision pertaining more to the normative-institutional dimension of the disciplinary order. Put in more materialist terms, one might speak of the international disciplinary public goods as those of initially domestic character, namely the material-institutional framework of the future dominant IR community, elevated to the global/international level. This would mean that the disciplinary infrastructure, including IR programs, journals, conferences, grants, and fellowships for conducting research in local institutions, are available to the members of other IR communities on a scale that exceeds the cases of exchanges, publications, and

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<sup>705</sup> See section 2.1.2.

<sup>706</sup> Habermas 1989

<sup>707</sup> *Ibid.*, pp.41-51

professional appointments based solely on personal acquaintance with a particular scholar. The point here is that the hegemonic IR community takes the burden of educating, evaluating, and rewarding those who do not belong to it. The latter is a one-way process, with the respective “free-riding” community not paying its share in the global discipline construction. To illustrate this point more explicitly and in a broader disciplinary context, it makes sense to turn to the conventional claim regarding the inequality of exchange between the core and periphery of the discipline.

In one of its versions, which focused more on the issue of the lack of “non-Western” IR theory, it is assumed that this kind of theory does not exist because the periphery of the discipline, i.e., dominated communities, does not produce it since they are entitled with the task of delivering data, rather than theory, with the latter charge being reserved for the core of the discipline, thus creating an international division of scholarly labor which maintains the subordinate and dependent position of the disciplinary periphery concerning its core. However, suppose one looks at this issue more from the perspective of the international disciplinary public goods provision and the disciplinary free-riding problem. In that case, it changes the whole picture. In particular, one should ask herself how much resources this peripheral community had “paid” or “invested” into creating the abovementioned theory developed within the discipline’s core. Does the data-collection process it is entitled to take as many scholarly resources as the one associated with theory production (starting with professional training, going through various theory talks during the conference roundtables, and ending up with years of payment slips to “theory scholars” with no immediate and guaranteed results coming). In this sense, the disciplinary-burden share by the hegemonic community is higher, and the dominated community obviously “gets” more than gives back since theory, methodology or epistemology has all of the features of the public good, international or domestic, thus perfectly fitting the realist HST framework concerning the public goods thesis.

Finally, this way of thinking about the disciplinary hegemony allows for an additional assumption, or better to say, a reformulation of a conventional claim regarding the disciplinary dominance, namely the one associated with imposition (whether coercive or consensual) of the “preferred” by the hegemon way of doing IR. The realist analogy for hegemony allows one to decrease normative anger and slightly make it more neutral. In particular, even if one imagines that this state of disciplinary affairs is the case, then instead of judging it in terms of raw and evil domination, we can approach it in terms of an attempt on the side of the hegemon to decrease its share in the disciplinary public goods provision through increasing that one of the communities which thus far had only enjoyed the fruits of the former process.

Following Kindleberger, we might say that the hegemonic IR community attempts to bind the members of the “international” discipline of IR to some rules of conduct, which might bring in a more equitable burden allocation, thus decreasing the expenses of hegemon, and general inclination for a free-riding, on par with clearly envisioning the framework of sanctions for overstepping the abovementioned system of rules of behavior.<sup>708</sup> Then, in the case of IR, the introduction of theoretical orthodoxy, on par with dominant methodological and epistemological frameworks, is not the case of exploitation and subjugation but rather a price one pays for taking part in the global discipline of IR. Whoever is not satisfied with this international disciplinary order is free to invest her resources to create an alternative one based on different theoretical, epistemological, and normative principles; and, what is even more critical, as more attractive to others so that those others are ready to pay their share (either directly or through “taxation” as in the case

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<sup>708</sup> Kindleberger 1981, p.252

of the US dominance in the form of quantitative methodology and positivist epistemology) after the “hegemon” of this order stops sharing most of the disciplinary burdens.

In this way, as one can see, applying a more realist analogy framework to the disciplinary hegemony allows one to conceive it not so much as an order of exploitation and coercion but rather as an order based on the provision of public disciplinary goods and with some form of “hegemonic taxation” being in place, understood as the “preferred way of doing” IR.

### 3.2.2.2. Interdependence among IR communities

The neoliberal perspective, in its parental discipline emanation, namely the liberal institutionalism, with its emphasis on non-fungibility of power, issue areas, and complex interdependence, might be of some help as well in the process of shifting away from a simple diversity vs. homogeneity paradigm of thinking about the disciplinary dominance.

Although we are staying within a somehow similar framework for the understanding of the disciplinary power, to make it more “neo-liberal,” we have to consider the fact that material power possessed by an IR community would be significantly scaled down during the process of power conversion when applied across various disciplinary realms. For example, the US IR community commands the most significant number of IR scholars and possesses the largest research fund is of little help for the latter if it decides to influence the institutional structure of IR in Croatia; in this case, it comes close to zero. Another example, actually, a better one, would pertain to the most favorite issue within disciplinary sociology, that of scholarly emulation – namely that the factors mentioned above are barely able to directly “make” someone emulate the US disciplinary fashion.

Instead, if any “influenced” motivation is possible, it has its roots within a different logic of power dynamics. In particular, we have to speak of the complex disciplinary interdependence or, put differently, the ratio of mutual sensitivity and vulnerability among the IR communities. The former, thus, would mean the extent to which a change in one’s IR community institutional structure, research culture, thematic agenda, or theoretical and methodological way of doing IR affects another community(-ies). At the same time, the latter would pertain to the ratio between the price an IR community has to pay to adjust itself to the latter change in another community and the cost of disrupting this relationship, or what some authors in the dependency theory tradition refer to as “delinking.”<sup>709</sup>

Yet, as one can see, in this formulation, the analogy does not make much sense since it appears difficult not to measure those co-dependencies but rather to conceptualize them properly to lay the ground for an adequate operationalization. Thus, it makes sense to turn to the “net” property understanding of hegemony, namely the one where the disciplinary hegemon attains “local” dominance in several most essential issue areas, thus being able to “transform” it into the global hegemony. However, even in this case, it would not go about mere “coercion” but rather an ability of the disciplinary hegemon to create a rules-based order through the manipulation of costs and benefits. In this sense, disciplinary hegemony is a rule-based disciplinary order, and hegemony as a property of a hegemon is the latter’s ability to “shape” the interests of other IR communities through the “carrot and stick” logic. In this way, it is somehow in opposition to the previously described realist disciplinary hegemony since, in the former case, the disciplinary hegemon is not able to “control” the public disciplinary goods it produces, and “taxation” comes only after the former is “declining” and capable of taking the most considerable burden, while in the current case, the disciplinary hegemon is in charge of distributing the benefits

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<sup>709</sup> See section 2.2.1.

and can “punish” those who do not adhere to the rules propagated through the exclusion from the “club.”

This neo-liberal analogy for the disciplinary hegemony is the closest in terms of mechanics and substance to what is referred to as hegemony in most of the sociology of IR scholarship, although without the flavor of critical theory and reflexive normative stance. The reason for this might be the issue of coercion, understood in Realist terms as literally impossible in the scholarly realm. For the latter, coercion is easily linked to military power and conflict. At the same time, it is hardly imaginable in academia, with its substitute being institutional “exclusion” and “marginalization.” Put differently, the worst thing that could happen to an IR scholar is that she loses her position (research and teaching) and is refused opportunities for publishing or presenting. At the same time, no “physical” threat to her existence is possible from the side of her IR community or an external hegemonic one. Thus, this natural absence of physical “violence” makes most of the accounts of the disciplinary hegemony easily linked to the neo-liberal one. Ironically, such accounts are linked more often to the Realist IR tradition, with the only possible explanation being not the one forged in heuristic terms but rather moral and emotional: neo-liberalism, although being a part of the IR’s mainstream is not considered to be as “bloodthirsty,” “immoral” and “inhuman” as its realist counterpart, thus allowing for a “pinch of “righteous disgust” as the essential emanation of the evilness of exploitation and dominance.

To sum up and elaborate a little bit further, the disciplinary hegemony, in its complex-interdependence emanation, would relate to the “primary” position of an IR community within a framework of dependencies across the disciplinary “issue areas.” This, in its turn, analogically to the neo-liberal understanding of the complex interdependence would pertain to the IR’s position within the framework of the international disciplinary public goods provision, namely what kind and quantity of those “goods” an IR community can “produce” and “supply” on par with the “demand” for those from other IR communities; its position within the “issue-specific” international disciplinary regimes understood in terms both its ability to preside over a framework of disciplinary costs and benefits distribution and establish rules and norms governing respective disciplinary issue areas; and the exclusive character of the public disciplinary good provided by the former IR community.

All of this sets the framework of the neo-liberal analogy for disciplinary hegemony, which explains the latter’s consensual character. In particular, contrary to the simplistic realist analogy present in the field,<sup>710</sup> here we would speak of cooperation being the primary source of a hegemonic disciplinary order, namely the “rationality” on the side of the various IR communities that dictates them the calculation of costs and benefits as to consent to the disciplinary order based on the last analysis, and the subsequent disciplinary interactions acquiring temporal permanency, thus creating a normative, regime-like framework not directly linked to the initial predominant position of the hegemonic IR community. To say that the current disciplinary situation resembles the last assumption is close to unnecessary tautology. Thus, the disciplinary hegemony in its most apparent conceptual form pertains to the moment when various disciplinary regimes exist. The dominant community can govern and substantiate them, coupled with the latter’s present material preponderance. In this sense, and contrary to the realist analogy, hegemony is not a necessary condition for increasing disciplinary cooperation on the international level. However, it acts as a significant facilitator of the latter.

Thus, as one can see, the consensuality of the disciplinary hegemony understood in neo-liberal terms is based on its regime-embeddedness. However, what is an international

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<sup>710</sup> To be more precise this is not much of a realist analogy, but rather a masked post-colonial attitude with the dominant Other being by definition conceived as a rational power-seeker, aiming at homogenizing the cultural and social space within the range of its reach.



regime itself? Luckily, the notion of scientific regimes is quite a well-elaborated notion in the sociology of science and turns out to be quite similar to the one found in Keohane concerning the international economic and political regimes, thus allowing us to apply the same understanding to the disciplinary realm of IR.<sup>711</sup> Following Keohane and his understanding of international regimes, international disciplinary regimes might be composed of disciplinary principles, norms, rules, and procedures. Those three elements revolve around a specific international issue area, thus making it neatly correspond with the thematic, disciplinary divisions according to substantive focus or issue areas.<sup>712</sup> In such a way, we would speak about the international disciplinary regime as identical to its thematic sub-fields, such as IPE, foreign-policy analysis, or even international political theory. The abovementioned elements fit this conceptualization quite neatly as well.

The principles element comes about an explicit formulation of the sub-field goals, for example, understanding the issue of organized violence and military conflict, in the case of security studies, or the economic interactions on the global level, in the case of International Political Economy. In this case, we can also say that the principle element of the international disciplinary regime corresponds to the sub-discipline's subject matter. The norms element might be easily associated with basic ontological, and epistemological assumptions agreed on and accepted by the participants of the disciplinary regime, with the regime's rules being embodied with the typical way of theorizing based on the latter element of the regime's norms. And finally, the procedural part is easily associated with the subfield's methodological framework(s).

Also, one should keep in mind Keohane's point regarding the legitimization function of international regimes, like the one of possible usage in the sociology of IR. In particular, we can conceive that the current framework of "sub-disciplinarity" in IR legitimizes the scholarly inequality and intellectual dominance many speak about nowadays. This is not a huge step forward in understanding disciplinary hegemony; however, it gives more advice on how and where to search for disciplinary dominance rather than a mere assumption that Realism and positivism are the benchmarks of the US IR community dominance. Thus, who controls the membership of those regimes or can define its composite elements might be said to possess the disciplinary hegemony, either the issue-area specific one or, if the critical mass of the issue-area hegemones accumulates, the global disciplinary one. Although all of this might look incredibly banal and self-evident to many IR scholars, it is essential to advise the reader to reapproach the literature review section to notice this banality and simplicity, at least concerning the conceptualization of hegemony missed by disciplinary sociology.

In addition, another point concerning hegemony in the neo-liberal perspective deserves our attention as a possible source for analogies in the case of disciplinary hegemony. It concerns the hegemonic socialization and internalization of the norms propagated by the hegemon on the side of the secondary state elites or, put differently and as about the realm of disciplinary sociology, the issue of scholarly emulation of the preferred way of doing IR.<sup>713</sup> The general line found in neo-liberalism roughly corresponds to that found within the sociology of IR, however, with several essential points missing. In particular, it concerns three basic hegemonic socialization mechanisms: normative persuasion, external inducement, and international reconstruction. The latter two are pretty well grasped by the disciplinary sociology and pertain to the internalization of disciplinary fashions through graduate-level education or general disciplinary training completed in the

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<sup>711</sup> Here one must be cautious and aware of proper terminological misuse. In particular, the disciplinary regime might refer to one of the kinds of scientific regimes, on par with technology, innovation, and utilitarian regimes. For a better elaboration of this point see Marcovich and Shinn 2012

<sup>712</sup> See section 2.2.1.

<sup>713</sup> See section 2.2.1.

educational institution located “within” the dominant IR community or the one which firmly adheres to the latter’s view of the knowledge production, on par with various interactions within the international “public sphere” of the discipline. However, the third one seems to be omitted by disciplinary sociology, namely that of internal reconstruction. In disciplinary sociology, it would point to a situation when the local discipline is “transformed” by the hegemonic IR community in the aftermath of a large-scale historical change occurring in the broader societal context of the local IR community. This might pertain to such cases as the “return” to the West of the Central European disciplines of IR in the aftermath of the collapse of the COMICON, the aftermath of the USSR’s dissolution, or the immediate aftermath of the decolonization in the mid-sixties. Although the literature partially covered those cases, they were not considered in terms of the assumably hegemonic IR community “intervening” in the reconstruction of the local discipline.<sup>714</sup>

An additional point regarding hegemonic socialization concerns the two-way character of this process. While disciplinary sociology conceives disciplinary emulation as a one-way process, the neo-liberal account acknowledges its mutual character. Otherwise put, it is not only the hegemonic IR community that makes the secondary IR communities emulate its disciplinary fashions, but those secondary communities are capable of affecting the former’s way of doing IR and even bringing it to revision, making the dominant IR community adjust the disciplinary framework to the latter criticism. As a possible example of such a situation, one can quickly mention the very sociology of IR in its emancipatory version with its emphasis on Global IR and non-Western IR theory. Keeping in mind that there is a consensus in the disciplinary sociology regarding the material (institutional) predominance of the US IR community and the fact that the most well-known pieces of scholarship are being discussed within the latter’s public disciplinary sphere, it is only one step towards “reversing” the conventional argument. In particular, the very acceptance of this issue as an important one, at least from the perspective mentioned above, might be interpreted less as an outcome of the counter-hegemonic movement or resistance to the disciplinary dominance but more as a modification of the disciplinary agenda by a dominant IR community.

Finally, we come to the concept of soft power as another reference point for disciplinary sociology.<sup>715</sup> As mentioned earlier in this work, this concept is essential for disciplinary sociology since most of the conceptualizations of disciplinary dominance and hegemony focused on the consensual element of the latter, namely scholarly emulation, employing the notion of soft power as the source for conceptual borrowing.<sup>716</sup> The irony here is that some of those accounts choose Gramsci and neo-Gramscianism as their reference point; however, as was already mentioned, they have much less in common with the latter than with Nye’s concept.

First, a common mistake concerning the conceptual transfer of soft power in the sociology of IR should be mentioned. It mainly involves the context and rationale of Nye’s formulation of it. As mentioned, he attempted to address the thesis regarding the US decline as the global hegemon in the late seventies and early eighties. This is important since he formulated it to account for the evident relative material power decline of the US and second the mistake of the latter’s decline evaluation, namely the low-base bias (the post-War moment as the point of initial comparison). As the reader might remember from the second chapter of this work, Nye put forward the concept of soft power as pointing to the shift of the dominant logic of the hegemon, namely making dominance “cheaper”

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<sup>714</sup> Ibid.

<sup>715</sup> See section 2.2.2.

<sup>716</sup> Ibid.

through shifting from domination conceived in material terms, toward the one shaped in immaterial terms and operating through the mechanism of attraction.<sup>717</sup> In this sense, transferring to the disciplinary sociology realm would have meant a specific sequence of the disciplinary power dynamics, namely the one where the material predominance of the US IR community is followed by a steady decline of the latter, with the simultaneous increase of the “emulatory” tendencies within the “international” realm of IR. However, according to the above-described literature, a different situation is the case, namely that material dominance is preserved, while emulation is actually “decreasing” if one considers the early studies on disciplinary dominance.<sup>718</sup>

Moreover, it is not just that empirically the IR’s disciplinary dynamics do not suit Nye’s framework of the transformation of power. Still, it is also different in that within the sociology of IR, scholarly emulation is considered the primary expected outcome of actual and full-blown dominance. For Nye, it was the way of making things easier for the hegemon; for the sociology of IR, it is the primary rationale of action and the ultimate goal for the dominant IR community.<sup>719</sup> This “reversed” reading of the concept might also be attributed to the low-base bias of the sociology of IR concerning theoretical homogeneity and scholarly emulation. Otherwise, we compare accounts of the composition of the field when other communities barely existed with the one nowadays, when we have a variety of well-established IR communities worldwide. An ironic explanation if one keeps in mind that it was precisely one of the accusations Nye put against the declinists.<sup>720</sup>

### 3.2.2.3. Emulation with recognition

The main obstacle to drawing a direct analogy for the disciplinary hegemony from the English School (ES) writings on the international, as was already mentioned in the respective subsection of the second chapter, is the place “hegemony” occupies in the latter’s conceptual framework, namely its secondary and descriptive status.<sup>721</sup> Moreover, one should remember that the notion of hegemony, understood in terms of material importance or overall preponderance within the international system, runs in an opposite direction of the ES’s way of perspective, namely its focus on the possibilities and prospects of the development of the international society.<sup>722</sup>

Yet these limitations cannot wholly deprive us of drawing some analogies from the school’s tradition of theorizing the international. In particular, the first helpful analogy for disciplinary dominance is the “location” of hegemony. This analogy concerns Bull’s assumption regarding the two types of sources for the international systemic dynamics.<sup>723</sup> Following this point, we can say that disciplinary hegemony occurs only when speaking of the interaction between a strong IR community (with no specific anchoring of the sources of this predominance) and the much less powerful one. Thus, one cannot speak of the disciplinary hegemony in global terms but only within the context of “local predominance.” Put differently, it would not make sense to search for patterns of disciplinary hegemony in relations between the US and UK IR communities, or French and German, since the latter is reserved, as a possible way of interaction, only for such pairs as the US and Lithuanian, or the UK and Portuguese IR communities. This banal and seemingly self-evident analogy introduces a significant modification for the sociology of IR since, at least as of now, most of the studies are focused on either aggregate indicators for the whole “international” discipline or while being preoccupied with such relational

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<sup>717</sup> Ibid.

<sup>718</sup> Ibid.

<sup>719</sup> Ibid.

<sup>720</sup> Ibid.

<sup>721</sup> See sections 2.3.1 and 2.3.2.

<sup>722</sup> Ibid.

<sup>723</sup> Ibid.

couples, go more into the direction of the “informed observer” way of investigating possible patterns of dominance.<sup>724</sup> All in all, from this perspective, one cannot find any marks of disciplinary dominance while looking at, for example, the most prestigious IR journals primarily located in “powerful” IR communities since, according to the ES logic, there one would see patterns of the “Great IR communities politics,” rather than those of hegemony.

Returning to the forms of local disciplinary predominance, we might say that hegemony is only one of three possible – we can also speak of dominance and primacy. The three do not constitute a framework of separate notions. Still, they act as parts of the continuum of disciplinary predominance, defined by a changing degree of consensual emulation and disciplinary marginalization. Following the ES framework, we might speak of dominance as when the less-powerful IR community does not acknowledge the more-powerful one as the disciplinary role model and its right to violate the disciplinary norms.<sup>725</sup> However, due to the “power” disparity between the two, the less powerful community has no other option but to “emulate” how the discipline is done in the more powerful community to avoid losing access to the latter’s resources. Disciplinary primacy, in its turn, might be seen as a “recognition” of the more powerful IR community by the less powerful as the one carrying the larger share of the common “burden” of disciplinary development, thus acknowledging the latter’s status as the disciplinary role model and its right for situational violation of the commonly shared disciplinary norms, such as, for example, geographical diversity and theoretical plurality. Thus, disciplinary hegemony would be between the two and comprise both elements. In this sense, it would be a mix of “emulation without recognition” or “compelled emulation” and “emulation with recognition” or “consensual emulation.”

Moreover, since this continuum initially applies to forms of “local” disciplinary predominance, namely between a more powerful and a less powerful IR community, we need to further elaborate it for the global level of the discipline, i.e., involving more than just one less-powerful IR community. In this case, we can speak of disciplinary hegemony globally or other forms of predominance in two senses: structural and substantial. The former would apply to the structural weight of the most frequent form of predominance, namely how many less powerful IR communities are “compelled” to emulate some specific way of doing IR. We would speak about such a structure as one of disciplinary dominance. In case most less powerful communities are involved in the consensual emulation, one might talk about global disciplinary primacy. In contrast, when the “distribution” of those two types of emulation is more or less equal, we can speak of disciplinary hegemony, at least as it was noticed in structural disciplinary distribution. The substantial sense would then approach the global dimension of the discipline in terms of the unified disciplinary order, based solely on one of the forms of predominance, namely as its primary logic of functioning.

Although with this kind of interpretation, we stay within the same structural logic characteristic of the classical tradition mentioned in one of the subsections of this chapter, it allows for a more nuanced consideration of disciplinary dominance, and it does so in several respects. It assumes dominance as *always* present in the relations between IR communities and, to some extent, natural since it stems from “power” disparities between those IR communities. In this way, similar to the case of the difference between Realism and ES, it shifts away from the logic of functional equality of IR communities.<sup>726</sup> It makes dominance not a deviation from the way things *must* be in the global dimension of the

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<sup>724</sup> Ibid.

<sup>725</sup> See sections 2.3.1 and 2.3.2.

<sup>726</sup> Ibid.

discipline but rather a structural form those natural inequalities take and disciplinary hegemony, one among several possible forms of the former. Moreover, it makes hegemony and other forms of disciplinary dominance the constitutive factor of the international “order” of the discipline. What matters in such ES reading of disciplinary hegemony is not the power predominance per se but the kind of interaction framework established between the dominant IR community and those less powerful, namely based on recognition of the status of the dominant IR community on the side of the latter communities, and, as a consequence, consensual or compelled scholarly emulation being in place.<sup>727</sup>

Finally, in the author’s view, it allows for a better conceptualization of disciplinary coercion. If one speaks of marginalization and exclusion, separating the latter two from the cases of disciplinary discontent becomes difficult. Put differently, if someone is excluded or silenced, then how do we know about them? Commonsensically, we cannot know someone who is “not known.” Thus, to speak of disciplinary marginalization and exclusion, we should talk about either someone “bringing” those who are marginalized or those who are marginalized and banned from speaking to us directly. The former is just a “labeling” procedure and cannot be protected from personal or other sampling biases, while the former perfectly suits the commonsense situation. However, if those marginalized can voice their discontent, and reach some disciplinary audience, would it not mean that they are a part of the discipline, an “unhappy” and “non-privileged” but still a part of it? The difference between the consensual and compelled emulation seems to be a perfect framing for this situation of a lack of “recognition” of the dominant IR community and the subsequent discontent concerning the need to do the discipline the latter “prefers.” Thus, the beloved dichotomy of disciplinary sociology, between coercion and consent, acquires a way better conceptualization, which, in addition to everything abovesaid, is also easily operationalized within the questionnaire akin to the one of TRIP since one can “ask” if IR scholars are “happy” with the assumed mainstream.<sup>728</sup>

To sum up, thanks to the ES analogy, we can solve, at least to some extent, the disciplinary “coercion-violence” issue so acutely felt in disciplinary sociology.<sup>729</sup> In this way, coercion becomes associated with a mere emulation without recognition or reservation, while disciplinary consent is linked to emulation with recognition. However, one must be careful with this conceptualization since it should be used within a properly and adequately defined conceptual framework. In particular, it should be employed in a framework talking about the whole “doing of IR” according to the hegemon’s way, not just a theory or two.

Finally, although most of the above-described analogy rests on rereading Bull and Watson, surprisingly and luckily, it fits Clark’s attempt to “institutionalize” hegemony quite well.<sup>730</sup> The trick here is that for Bull and Watson, hegemony had any chance for recognition or legitimacy only if it was thought of in the context of more powerful and less powerful relations. At the same time, Clark spoke of it in global terms, about the whole international system and acquiring the same level of legitimacy as the institution of Great power politics. To make our conceptualization of hegemony perfectly suit Clark’s case, we need to introduce a reservation that only one predominant IR community exists in interactions with the “rest” of IR communities; the international dimension of IR arises based on the same notions of recognition and legitimacy as in the previous case.

However, there is still an essential element in Clark’s theorization of hegemony as an institution, namely the typology of hegemony according to the composition of the hegemon and the scope of the constituency. Applied to the case of IR, then we might speak

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<sup>727</sup> Ibid.

<sup>728</sup> See sections 2.3.1 and 2.3.2.

<sup>729</sup> Ibid.

<sup>730</sup> Ibid.

of typology for disciplinary hegemony as based on its composition, namely how many IR communities “comprise” the hegemon and the scope of the constituency, namely from “whom” comes recognition and legitimation needed for the stability of disciplinary hegemony, and its acquisition of the institution like character. In the case of the former, we would speak then of singular and collective hegemony, while in the case of the latter coalitional and inclusive disciplinary hegemony. The singular type would pertain to a situation in which only one national IR community is the disciplinary hegemon. At the same time, the collective one refers to a situation when several national IR communities comprise the disciplinary hegemon. The coalitional hegemony would refer to a situation when legitimation is needed only from a narrow group of IR communities. At the same time, inclusive would assume recognition is required from all the communities comprising the international disciplinary order.

As one can see, the ES analogy for disciplinary hegemony is helpful in two respects. First, it introduces the relational element into the issue of disciplinary dominance, namely the aspect of legitimacy through recognition.<sup>731</sup> This, in turn, allows one to overcome the problematic character of conceptualizing coercion within a scholarly realm, which is, by definition, free from “violence” conceived in other fields of social and political theory. Second, the shift away from the categorical typology of hegemony allows for a better grasping of the structural variability of disciplinary dominance with the help of the continuum analogy. It allows for a better structural understanding of disciplinary dominance, on par with looking into the “social” dimension of the latter while staying within the community-centered perspective.

#### In conclusion

In conclusion, the initial idea of analogical thinking regarding disciplinary hegemony was fruitful. It is not only Gramsci who helped in elaborating a more all-embracing framework for the disciplinary hegemony, but also the Mensheviks and Bolsheviks debate which introduced the difference between autonomy and strategy. Post-structuralism, in its turn, with Laclau and Mouffe, allowed us to see a new perspective regarding discursive disciplinary dominance. Instead of speaking about what is so much European or Western-centric in the primary conceptual apparatus of the sociology of IR, we can now see this kind of discursive dominance from a different angle, namely the one of the empty signifier. In this case, the disciplinary hegemony is not an ability to establish intellectual orthodoxy or fill in the primary disciplinary conceptual apparatus with its own “meaning” but rather is the latter’s ability to create conceptual frameworks with the broadest semantic applicability, however, without any specific one.

Paradoxically, realism proposed something more than a mere power predominance, namely the notion of a hegemon as a disciplinary public goods provider, who acts following the logic of international disciplinary stability, and occasional disciplinary taxation. Neo-liberalism switched our focus from the material basis of disciplinary as about the whole disciplinary realm towards the one which is instead focused on controlling crucial disciplinary areas, international disciplinary regimes, or, put differently, disciplinary sub-fields in its transnational emanation. The ES perspective, in its turn, completely changed our understanding of disciplinary emulation, allowing us to see the social and recognition-based understanding of the latter, coupled with the opposition of compelled emulation versus a consensual one. The neo-Gramscian perspective, in its turn, introduced the ideas regarding the genealogy of disciplinary hegemony, its hegemonic agents, and the respective multidimensionality of the latter.

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<sup>731</sup> See sections 2.3.1 and 2.3.2.

## Chapter 4. Peripheral publishing: IR in Ukraine and Belarus

### Introduction

This chapter tries to bring together two contradictory inclinations of the current work's author. As became evident to the reader, the first is an interest in the conceptual realm of disciplinary sociology, expressed in the present work's preoccupation with disciplinary hegemony. The latter, in its essence, is a strive for analytical generalizations, which is hardly compatible with case-specific explanatory frameworks. The second is a genuine interest in Eastern Europe as a politico-historical region and, by extension, the intellectual dynamics of the latter. In turn, the latter is a preoccupation with a unique case that resists any generalizations and requires fiercely specific arguments and explanations.

However, the following chapter requires a compromise between the two. A settlement is difficult to achieve, if possible at all. The point is that the two oppose each other substantially, stylistically, and heuristically. They assume different questions to be asked and, more importantly, different types of answers to be given. On top of this, the internal division of labor within the sociology of IR complicates the whole situation. In particular, there is a clear and observable division between the "national disciplines" and conceptual issues literature.

The "national disciplines" literature prefers extensive historical case studies to explain and elaborate the national disciplinary specifics. Its empirical part usually concerns a comprehensive bibliometric survey of one journal or a local IR school, with its outcomes used for the local specifics and dynamics explanations.<sup>732</sup> The general questions of the sociology of IR are of no primary purpose for such studies if only not concerned with a specific issue. The normative literature, in turn, prefers conceptual work; however, it uses extensive aggregate data to support its normative claims.<sup>733</sup> In this sense, the data barely serves any purpose apart from the affirmative one. In other words, the data is used to support normative claims regarding the state of the discipline rather than to advance novel theorizations and conceptualizations.

This work finds itself connected to the normative strand by the merit of dealing with the concept of hegemony and to the "national disciplines" literature due to its focus on two peripheral national IR communities. Thus, a thematic and analytical sacrifice has to be made. In this sense, this chapter has to preserve its conceptual connection to those found above; however, on the other hand, it has to provide specific local data supported by specific locally oriented conclusions. Hence, its two-fold character. First, there is a clear and significant shift away from the issue of disciplinary dominance in its conceptual form. This is a sacrifice in terms of the normative strand. Second, there is a clear lack of a detailed and historically oriented explanation of the local IR disciplines, which is a sacrifice in the national IR communities literature.

Moreover, formulating a specific and concise hypothesis that links this chapter to those above appears to be of additional difficulty. This is due not to the quality of the conceptual part or its empirical applicability but rather the general methodological state of the subfield. In other words, the methods and techniques employed by the subfield impose significant limitations on one's ability to test hypotheses that diverge significantly from the mainstream of disciplinary sociology. Finally, the very exploratory character of the conceptual part precludes one from fully realizing its empirical potential.

However, this is not to say that no empirical evaluation of the previously given assumptions is possible; it is to say that the depth and reliability of those evaluations would

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<sup>732</sup> Shahi 2016; Malhotra 2009; Zaman & Yasmin, 2022; Köstem 2015; Sula 2021; Halizak 2016; Czaputowicz & Anna Wojciuk, 2017; Pastusiak 1978; Cujabante-Villamil 2019

<sup>733</sup> Tickner 2005; Jørgensen 2014; Hamati-Ataya 2011, 2016; Bilgin 2008,2021; Acharya & Buzan 2010

be limited by the exploratory and compelled descriptiveness of the empirical part of this work.

Yet, those are more personal concerns linked to the fear of the current work's lack of structural and thematic coherence. Putting those concerns aside allows one to get a more positive perspective on this chapter, namely the one if its relation to the whole corpus of works on the sociology of IR, peripheral IR scholarship, and specifically, those dealing with IR communities located in Eastern Europe, or more widely conceived, the region of Central and Eastern Europe.

First, it closes almost a complete absence of any works aimed at describing the state of IR in Belarus and Ukraine, which in terms of the size of its IR community and firmness of the respective institutional structure, appears to be no less significant, than other «smaller,» nonetheless well-studied, cases such as Slovenia, Slovakia, Lithuania, Latvia, Estonia.<sup>734</sup>

Second, substantial differences in the socio-political history of the Central East European (CEE) countries created significant diversity in the «starting foundation» for each particular national case, thus decreasing the informativeness of regional-level comparisons or generalizations.<sup>735</sup> Third, differences in the geographical positioning of each of the CEE countries lead not only to different configurations of geopolitical issues and challenges but also to different levels of intensity and solidity of personal contacts among members of the regional IR community.<sup>736</sup>

Fourth, a low level of English language proficiency in countries of the former USSR, significantly lower than in all other CEE countries, makes any data on the number of publications in international or regional journals, with regards to the academic output, even less informative than in case of other CEE countries.<sup>737</sup> Thus, making regional generalizations concerning the position of the respective national scholars within the international scholarly division of labor, and the degree of their marginalization within the global IR community, is even less reliable. The elaboration and clarification of these points serve as a significant fraction not only of this chapter but also of the current work as a whole. Yet the question of the primary research question and investigatory purpose remains open. Thus, further preliminary elaboration is required.

Overall, this chapter is of a substantial two-fold character. First, it deals with the general sociology of IR literature based on the data concerning the national IR communities in Belarus and Ukraine:

- it tests locally the general US disciplinary hegemony thesis
- it tests the thematic and methodological dominance thesis locally
- it tests the disciplinary gender gap thesis locally
- it tests the linguistic hegemony thesis

The latter, in turn, is approached not through the conventional lenses of disciplinary sociology but rather with the help of the element of the WST hegemonic analogy formulated earlier in this work. Similar to the former literature, it conceptually conceives language as a primary tool for disciplinary dominance. However, contrary to it, it is a mechanism maintaining the lag in disciplinary development. Thus, the specific emphasis is put on the time lag between the article's publication date and the referenced source adjusted to the latter's language.

Moreover, concerning the general disciplinary sociology literature and hegemonic analogies of this work, it brings to exploratory testing several conceptual assumptions:

- it tests the semi-periphery hypothesis (Russian disciplinary dominance) locally

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<sup>734</sup> Drulak 2009.

<sup>735</sup> Linz, 1998

<sup>736</sup> Drulak 2009

<sup>737</sup> Ibid.



- it tests the issue-areas dominance thesis (neo-liberal analogy) locally

Finally, and concerning the regional literature, it brings for the empirical scrutiny a conventional idea regarding the commonality of disciplinary dynamics in the region of Central and Eastern Europe, and in this sense:

- it tests the CEE's IR thesis locally

Following the subfield's conventional methodological practice, this work employs journal articles content analysis, generally conceived. More specifically, it expresses its tripartite nature in the following manner:

- citation patterns analysis
- author profile analysis
- thematic content analysis<sup>738</sup>

A precise description of the methodological procedures and data collection techniques will be provided in the respective section of this chapter dealing with methodology. As a conclusive remark to this short introduction, and before this chapter proceeds further with historically and analytically "localizing" the cases, it makes sense to stipulate the general research question of this chapter, which is "What are the publishing patterns associated with two national IR communities of Ukraine and Belarus?"

### *IR in East-Central European cage*

To give more of a region-specific context, we have to review the existing literature on IR in Eastern Europe shortly. The first reservation which must be made in this respect is the fact that these works rarely use the term Eastern Europe (EE), and, as a consequence, they are rarely focused on this particular configuration of countries (Russia, Poland, Ukraine, Belarus, and the Baltic states). Instead, there is an observable trend of employing the term Central and Eastern Europe (CEE), which is justified by the claim that it is more all-embracing and allows one to grasp better historical, cultural, and political contexts for the analysis of IR's development on a regional level.<sup>739</sup> However, there are occasional remarks by authors of these works that their case selection out of the general universe of cases was predefined by linguistic factors, availability of literature in libraries of their respective research institutions, or even by the simple fact of their encounter with any data available for each particular case.<sup>740</sup> In its essence, there are two types of works: those concentrated on the disciplinary dynamics of IR in CEE as a whole, trying to deduce comprehensible trends and present us with satisfactory explanatory frameworks, and those works which deal with national IR cases.<sup>741</sup> Generally, both types operate within the three-dimensional perspective, namely national, regional and international (Global). Those writing on IR in CEE permanently make references to national cases, consider general regional dynamics, and attempt to assess interrelation and mutual co-influence of regional IR and Global one. Those writing on national IR concentrate on the state of the discipline within the national context, try to clarify the outreach of the national IR concerning the region as a whole, and write on the global posture of the respective national IR.<sup>742</sup>

As to the regionally focused literature, there are several typical topics. First, the pre-history of the discipline, or better to say, the starting point for assessing the disciplinary development and formulating it in a diverse array of ways and coining different buzz-terms, ranging from the "*re-/foundation or revival of the discipline,*" "*coming back to Europe,*" "*formative years,*" "a take-off of the discipline," towards the

<sup>738</sup> Dufort, Anzueto and Goulet-Cloutier, 2014

<sup>739</sup> Drulak, 2009.

<sup>740</sup> Ibid.

<sup>741</sup> Chaputowicz, 2012; Šabič, 2013; Roter, 2009; Kubáľková, 2009; Wojciuk, 2013.

<sup>742</sup> Bátorá and Hyněk, 2009; Berg and Chillaud, 2009; Morozov, 2009; Drulak, 2013; Guzzini, 2013; Volgy, 2013; Jørgensen, 2013

“western socialization.”<sup>743</sup> All of these terms are united by one *leitmotif*, namely the casting off the shackles of Marxist ideology and the oppressive communist regimes. But a reading of the same authors who claim a commonality of the historical experience presents a slightly different picture. For example, the Slovakian IR community sees its history starting in the early 60s of the XX century and linked to Tito’s non-alignment policy and the creation of the sociology of IR, significantly different from its soviet analog.<sup>744</sup> For the Czech case, the 60s are thought of as the dawn of the discipline due to the massive repressions of academics and the strengthening of the state control over the profession.<sup>745</sup> For the Polish case, the communist times are seen as a period of stagnation of the discipline, even if it differed significantly from its Soviet counterpart and preserved some national peculiarities and a degree of independent IR scholarly activity.<sup>746</sup> While for the Baltic States, Belarus, Ukraine, and ultimately Russia (though to a different degree and within a slightly different context), the USSR’s period seemed to be an era of the complete dictate of Marxism-Leninism, and as a consequence of the absence of the discipline of IR, as an independent and self-aware realm of scientific activity.<sup>747</sup>

The second typical narration point is the regional «institutional structure» of IR, which allows speaking about CEE as a European sub-region suitable for applying generalization schemes concerning the development of IR. Here we can observe a complete unity of views, which revolve around several points. First, the establishment, and subsequent successful development, of the Central and East European International Studies Association (CEEISA); second, the successful development of the Journal of International Relations and Development (JIRD) - both of these are provided as the primary evidence for the regional character of IR in CEE. The last most common topic concerns the marginalization of CEE scholars of IR within a broader international community. This marginalization is perceived as a consequence of the Anglo-Saxon hegemony in IR and CEE’s peripheral status concerning the latter (in linguistic, financial, publishing, and methodological terms).<sup>748749</sup> Being prescribed the role of the “regional data providers” seemed to result from domestic and external, i.e., “international factors.”<sup>750</sup>

This chapter has to deal with two cases that are more similar to the case of Russia, where the discipline was not only limited by the ideological dictate of Marxism-Leninism but also added local specifics. In particular, it refers to the core-periphery patterns internal to the Soviet discipline of IR<sup>751</sup>, namely the fact that theory or any other kind of substantial IR scholarship was produced at the disciplinary center, namely various Moscow-located institutions and universities. At the same time, those within the Soviet periphery were entitled to “diplomatic training” for the local, republican-level Ministries of Foreign Affairs. Thus, the two communities might be said to experience a double “peripheralization,” the one of the internal Soviet type and the one mediated by the peripheral status of the Soviet IR itself. The latter, quite neatly transformed into a kind of “independent” peripherality after the collapse of the Soviet Union, followed a similar pattern of westernization and rejuvenation characteristic of the Russian IR. However, without such a clear-cut opposite trend of the intellectual nationalism and autarky present

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<sup>743</sup> Drulak 2009, p.10; Jørgensen 2013, p.18; Šabič 2013, p.22; Kubáľková 2009, p.39; Berg and Chillaud, 2009, p. 26.

<sup>744</sup> Roter, 2009, p.13.

<sup>745</sup> Kubáľková, 2009.

<sup>746</sup> Wojciuk, 2013; Chaputowicz, 2012.

<sup>747</sup> Sergounin, 2000.

<sup>748</sup> Guzzini, 2007.

<sup>749</sup> Whenever the adjective “Anglo-Saxon” is employed throughout this chapter, the reference is made to the phrase of Holsti regarding the US-UK intellectual condominium rather than the current usage of the term by various conspiracy theory narratives, including those found in the Russian media sphere.

<sup>750</sup> Drulak, 2009.

<sup>751</sup> The issue at stake here is that without additional clarification, it might be well argued that those specifics do not have anything in common with the Soviet heritage but rather represent a demographic issue, as, for example, in the case of the US universities.

in the latter case. In the case of Ukraine, it is mainly about the “return to the West” characteristic of the Baltic state and Central European IR communities, while in the case of Belarus, it is still about a non-existent community between the West and Russia.

#### 4.1. Methodology

##### 4.1.1. Citation analysis

This work takes a similar stand concerning citation practice to the one found in Kristensen’s summary of perspectives associated with the sociology of science.<sup>752</sup> It refers to the current work’s preoccupation with citation practice, i.e., a meaningful socio-disciplinary act as opposed to a specific interpretation of the latter by various perspectives within the sociology of science domain.<sup>753</sup> Put differently, and partially following Kristensen, instead of taking a clear stand on the question of why scholars generally cite, this work is preoccupied with the fact of who is the reference “object” of Ukrainian and Belarusian IR scholars and where are those geographically and institutionally located instead of answering the question why do they cite generally, and in specific instances.<sup>754</sup>

This becomes more straightforward if one elaborates on the interpretative perspectives on citing as an academic practice. The first one, and the most commonsensical nowadays, is the one associated with the Mertonian sociology of science which takes a normative standing on citation practice. This reading conceives it as a due reward toward scholars whose work serves as a basis for the citing scholar’s work and is considered relevant for the whole field.<sup>755</sup> Thus citation practice appears to be a standardized system of rewards based on giving away intellectual property rights by the cited authors in exchange for possible recognition of their achievements.<sup>756</sup> This system appears to have accumulative and stratification effects on any scholarly field. Within this system, those frequently cited tend to be cited more often and publish even more than their colleagues, with this systemic outcome known as the Mathew Effect.<sup>757</sup> Moreover, as the scientific field progresses, this effect amplifies since the whole discipline “stands on the shoulders” of its founding fathers. However, even though citation practice is thought of to be based only on merit and quality of one’s work, the normative authors acknowledge that such a view is, at best, the ideal model rather than a real-world state of affairs: this is so due to the various “deviations” from the merit-based view of citation practice ranging from the “halo effect” and “friend-citation” to “cryptomnesia” and “obliteration by incorporation.”<sup>758</sup>

The second one is the constructivist perspective. This perspective stands in clear opposition to the abovementioned normative perspective due to the former’s shift away from the cited object’s quality to the cited subject’s incentives.<sup>759</sup> According to the constructivist view of citing practice, the latter appears to be a tool or a weapon one uses in scholarly battles.<sup>760</sup> One of the ways constructivists illustrate this view of citation practice is associated with citation as an “argument from authority,” which pertains to a citation not based on the argument found in the cited source but instead on the prestige of the cited author, journal, or institution.<sup>761</sup> A similar reading of citation practice is associated with the constructivist view of the latter as the “referencing-as-persuasion,” which means that a

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<sup>752</sup> Kristensen 2018, pp.248-252.

<sup>753</sup> Ibid., p.251.

<sup>754</sup> Ibid.

<sup>755</sup> Merton 1957, p. 646 cited in Kristensen 2018, p.248.

<sup>756</sup> Merton 1942, pp. 273-275; 1957, pp.639-640; Hagstrom 1965, p.13 cited in Kristensen 2018, p.249.

<sup>757</sup> Merton 1968b, p.58. cited in Kristensen 2018, p.250

<sup>758</sup> Cole and Cole 1973, p.221; Kaplan 1965, pp.181-182; Merton 1968a, p.35; Garfield 1975, 396-398 cited in Kristensen 2018, p.250.

<sup>759</sup> Latour 1987, pp.37-38; Luukkonen 1997 cited in Kristensen 2018, p.250.

<sup>760</sup> Latour 1987, pp.37-38 cited in Kristensen 2018, p.250.

<sup>761</sup> Gilbert 1977, p.116 cited in Kristensen 2018, p.250.

citation is a reference toward the source the author's audience may find persuasive rather than a reference to the relevant and argumentatively suitable one.

Moreover, citation practice might justify and demonstrate one's novelty and relevance to the field. It concerns situations when citation practice is used to create a recontextualized theoretical framework of the area to justify and legitimize propositions of the subject of citation practice.<sup>762</sup> Finally, in constructivist reading, the fact that a scholar refers to a work by another author may not even imply that the latter read the former work and understood it properly, and it had any actual influence on the citing work since it might be a mere affiliation sign (institutional, intellectual, etc.) or be there just for display.<sup>763</sup> Thus, the best way to approach citation practice with constructivist lenses is to conceive it mainly as the knowledge-claims defensive device.<sup>764</sup>

Finally, the third interpretation of citation practice is of the symbolic theory. As noted by Kristensen, this perspective occupies a middle ground between the abovementioned perspectives: it concerns the latter's simultaneous acknowledgment of citing as a reward practice and persuasion device; however, none of the two predominate.<sup>765</sup> Instead, they become a part of a more significant idea regarding citation practice, i.e., citing as a symbolic marker for position-taking and an element of the scholarly "symbolic capital."<sup>766</sup> In this sense, citation practice is a way to signify a specific argument or theory in a manner that exceeds and might even contradict the latter, i.e., "concept-symbol."<sup>767</sup> It appears to be close to the notion of the Laclauian empty signifier considered earlier in this work.<sup>768</sup> Thus, there is no surprise that widely circulated concept symbols like "Waltz (1979), Keohane (1984), or Wendt (1999)" owe their position to the social use by others rather than any intrinsic qualities of their own and might quite often have not much in common with the citing work.<sup>769</sup>

Similar to the case of Kristensen's case of co-citation communities and various other studies in the sociology of IR, this work cannot establish a clear-cut linkage between the citation practice and disciplinary hegemony.<sup>770</sup> Instead, it takes a cumulative stance on this issue, namely that variability of possible explanations for the meaning of the citation practice does not preclude one from treating the aggregate data concerning the latter as a benchmark of intellectual/disciplinary communication patterns, hence disciplinary dominance/inequality patterns.<sup>771</sup> It allows for more analytical freedom in terms of the data-interpretation: the purpose of this part of the work is not to test those theories but rather to get the most comprehensive image of the local disciplines of IR based on their published dimension. In this sense focusing on citation practices would allow us to see whom local Ukrainian and Belarusian IR scholars recognize as meaningful "disciplinary others": whether those come from the core of the discipline (e.g., US, UK, Canada, etc.), immediate geographical vicinity (e.g., other Eastern European countries), or from the USSR's period metropolis, namely Russia (especially authors located in Moscow). This, in turn, might allow us to speak of the corresponding peripheral, the regional, post-soviet character of the local disciplines or some specific combination of the three. The first instance will correspond to a clear predominance of the core authors within the citation patterns of the local discipline.

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<sup>762</sup> Gilbert 1977, p.116; Knorr-Cetina 1981, pp.111–112 cited in Kristensen 2018, p.250.

<sup>763</sup> Edge 1979, pp.111-112; Latour 1987, pp.33-34 cited in Kristensen 2018, p.250.

<sup>764</sup> Kristensen 2018, p.251.

<sup>765</sup> *Ibid.*, p.252.

<sup>766</sup> Bourdieu 1988, 76 Bourdieu 1975, 21.

<sup>767</sup> Small 1978, 328–29.

<sup>768</sup> See subsection 1.3.1.

<sup>769</sup> Lake 2011, 468.

<sup>770</sup> Kristensen 2018, p.253

<sup>771</sup> *Ibid.*

In contrast, the second will be reflected in the significant presence of authors from neighboring countries such as Poland, Belarus/Ukraine, Romania, Hungary, and Slovakia. The lack of relatively equal distribution of connections with other national IR communities in the region will point to the inadequacy of the Central East European IR thesis. At the same time, excessive reliance on sources from Russia will give us a clear hint of the post-soviet character of the discipline. The latter, adjusted to the fact that almost thirty years had passed since the dissolution of the USSR, will give us some grounds for speaking of the postcolonial character of the two respective national disciplines and/or the notion of the regional disciplinary hegemons.

To summarize, with citation analysis, we aim to test several hypotheses in an exploratory manner.<sup>772</sup> The first of them, namely the US disciplinary dominance thesis, pertains to the general sociology of IR literature and corresponds to the sheer presence of the US authors in the references sections of the Ukrainian/Belarusian IR scholars.<sup>773</sup> Second is the CEE IR thesis which comes from the regional IR literature and corresponds to the idea that there is a set of factors that allows one to speak of the regional, namely, the CEE discipline of International Relations. Here we operationalize it as a relatively high presence of authors from various CEE national IR communities in the references sections of the Ukrainian/Belarusian IR scholars. Moreover, with citation analysis, we aim to tackle the regional disciplinary hegemon/semi-periphery issue that corresponds to the idea that apart from the core and peripheral communities, there are those occupying the middle ground between the two and serving as a mediator between them. This thesis is operationalized as a substantial presence of authors from a national IR community in the references sections of the Ukrainian/Belarusian IR scholars, which conventionally is not regarded as a disciplinary core or its element.

#### 4.1.2. Author profile analysis

Concerning the author-profile analysis, this work proceeded in the following manner. First of all, it must be noted that this analysis remains a part of the overall content-oriented approach to the study of Ukrainian and Belarusian IR journals. It is a specific elaboration of the content-focused logic of the research. In this sense, article authorship with subsequent author-level attributes relates to scholarly articles as constitutive elements of the published dimension of local disciplines. In other words, we conceive the data about the authors of the articles as a unit-level characteristic that opens up an additional mental map of the local discipline. Thus, as stated above, we approach the attributive perspective of the “production” side of the peripheral disciplinarity with the author profile analysis.

This said, there is no surprise that while developing the coding framework, this work hinged heavily on the respective part of the TRIP codebook, namely the one dealing with author-level indicators. First, the dataset contains the author-name category where all authors' standardized names are listed (ex.: “Sergiy Pritula”). This category is composed of two variables, namely “Author’s name in English” (A#\_Name\_E) and “Author name in a local language” (A#\_Name\_LL). The latter variable contains standardized names written in either Ukrainian, Russian or Belarusian. The following variable pertains to the author’s gender (A#\_Gender\_MF) and is recorded individually for each author of an article, including those co-authored. The value of this variable is defined based on the gender pronoun encountered by a coder in the author’s biographical section, usually either in the footnote at the bottom of the article’s initial page or in the post-abstract heading. There are three values the variable may take “Male,” “Female,” and “Other.” If no relevant information on the author’s gender is found, the automatically assigned value is “Other.”

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<sup>772</sup> Rubin & Donkin, 2022

<sup>773</sup> Turton 2015

The following variable deals with the academic rank of the article's author (A#\_RankAC). It reflects the highest educational/research level achieved by the author. The initial TRIP coding framework did not contain this variable, primarily due to the character of the publishing fashions of the north-American IR journals where a "non-academic" author is quite a rare instance, with the latter publishing mostly in policy-oriented magazines. In the case of Ukraine and Belarus, the situation differs significantly, with the number of these authors being considerable. Thus, it seemed reasonable to introduce the educational status variable to create a broader interpretative context to get a better picture of publishing patterns.<sup>774</sup>

Moreover, additional adjustments were needed due to the specifics of the local educational systems, with their different structures of academic titles, such as a two-fold structure of the postgraduate/research degrees. This variable can take four values. First is a "Student" value which pertains to those authors who were either Bachelor's or Master's level students at the moment of the article's publication or whose highest academic degree achieved by that moment was either Bachelor's or Master's degree. The second value is a "Ph.D. Student," assigned to those pursuing their doctorate at the moment of the article's publication. The third value is a "Candidate of Science," set for those holding a degree of a Candidate of Science at the moment of the article's publication, with a similar logic of assignment reflected in a "Doctor of Science" value.<sup>775</sup>

The following variable deals with the institutional position held by the article's author. It might take six values. The first is "Docent" and assigned to those holding a university position of a docent, with the latter roughly corresponding to the European or north American Associate Professorship. The value of "Professor," similar to the previous case, is assigned when the author holds an "Ordinary/Full Professorship." The "Researcher" value is given to those holding various research positions across academia, ranging from research (non-teaching) institutes to research laboratories and problem-oriented research clusters/groups. The "Other (academic)" value is assigned to those authors who held non-tenure track/non-research university positions ranging from the department assistant to the visiting instructor at the moment of publication. The value "Other (non-academic)" is assigned to those employed outside academia or the research sector, for example, local MFAs or private enterprises. Finally, the value of "Ph.D. Student/Student" is assigned to students at the moment of the article publication.

Now we move to the category dealing with the authors' geo-institutional location. It is comprised of several variables. The first is "Author's Affiliation" (A#\_Institution), which designates the author's institutional affiliation. Its value corresponds to the name of the institution where the author works manually entered into the coding interface. This information, similar to the gender, rank, and position variables, is taken from the article. If there is any lack of clarity or suspicion regarding the information provided in the article, coders were instructed to check the author's institutional affiliation through a web search (google-search, google-scholar, Wikipedia, ORCID, etc.). Another variable is linked to the "geographical" location of the author's institution (framed in terms of the nation-state) and designated in the data set as the "Institution Country" (A#\_Institution.Country).

This relatively simple coding scheme allows us to establish a complementary analytical ground for approaching the published disciplines in Ukraine and Belarus. In particular, it will enable one to assess the internal core-periphery patterns of the discipline

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<sup>774</sup> In this sense the variable coding of this work is different from the TRIP coding framework, where this variable pertains to the academic status of the author, namely its position within the academia, or outside of the latter. This data is reflected in this work as well, however, within the "Author's position" variable.

<sup>775</sup> The titles of "Candidate of Science" and "Doctor of Science", in Ukraine and Belarus, are the heritage of the Soviet educational system. While the former can be paralleled with the European and American Ph.D., the latter is difficult to compare, with the jokish label of the "Advanced Ph.D." being the best description thus far. However, the latter doesn't have much to do with any research skills or training, being mostly a matter of prestige recognition.

by investigating the distribution of the published articles according to the “metropolitan/regional institutions” authors’ affiliation.<sup>776</sup> Moreover, and not least, it allows us to assess the local disciplines in terms of the disciplinary gender gap characteristic of the core national IR communities. Finally, the data regarding the country of institutional affiliation opens up an opportunity to reflect on several questions. The first deals with the issue of internationalization vs. insularity of the local discipline in its published version, while the second allows a preliminary observation regarding the CEE IR thesis.<sup>777</sup> In its operationalized form, the first question will correspond to a high or low number of articles published by the authors in the “foreign” national IR communities.

In contrast, the second corresponds to a high or low number of articles published by the authors in the CEE national IR communities. It might also allow probing into the issue of regional disciplinary hegemony by looking at the relative predominance of authors from one specific national IR community, different from the local one.<sup>778</sup> Yet again, the author-level data allows one to get a glimpse of the local “generational” dynamics by looking at the dynamics of publishing patterns concerning the triad of “Student – Docent – Professor” or that of “Student – Candidate of Science – Doctor of Science.”

Finally, if later merged with the data from the citation analysis, namely that of the citation time-lag and reference language, it opens up an additional interpretative perspective, namely that of the disciplinary dynamics. In particular, it makes sense to assume that authors of various institutional and educational ranks and positions show multiple patterns of citation habits. For example, it might be the case that Ph.D. students tend to use more up-to-date literature in their publications and more English-language literature. At the same time, those holding professorship might preserve “loyalty” to the older sources and the Russian language professional literature.

#### 4.1.3. Thematic content analysis<sup>779</sup>

All thematic categories employed to analyze the Belarusian and Ukrainian IR journals were taken from the TRIP’s codebook. Initially, this codebook was developed to approach the primary US IR journals. However, with various modifications and adjustments to local specifics, it was widely employed by scholars aiming at studying the published dimension of other national IR communities. One of the evident benefits of using TRIP’s coding framework is avoiding problems associated with coding category formulation. This, in turn, leads to higher levels of cross-case data reliability and higher volumes of data available to those interested in issues of the sociology of the IR domain. Although TRIP’s codebook contains various coding categories, within this work, only several are employed. In particular, the work uses six variables for the thematic categories found in the latter codebook. In the following paragraphs, one can find a short description of those variables and a short elaboration of the research rationale behind the latter.

In general, those variables can be described as belonging to the theoretical-methodological meta-category, which embraces semantic differentials concerning the methodology employed, the epistemological stance of the author, IR theories guiding her research, etc. The first relates to the paradigm advanced by the author (Paradigm). It applies to a broad range of terminology employed by IR scholars to “locate” their research and might take different forms such as theory, approach, tradition, perspective, etc. Overall, with this variable, the analysis attempts to grasp the primary theoretical framework used by the author to formulate her research question. This variable takes one

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<sup>776</sup> Kristensen 2015

<sup>777</sup> Drulak, Karlas & Konigova, 2008

<sup>778</sup> Ibid.

<sup>779</sup> One must be cautious while taking the name of the method used in this chapter at a face value. The problematic character of the methods definition might be found elsewhere. See: Humble & Mozelius 2022

of the following nominal values: realist, liberal, Marxist, constructivist, non-paradigmatic, and atheoretic.

The following sub-category relates to the fundamental epistemic-methodological perspectives expressed in the article. In particular, it relates to the primary factors shaping the international processes in world politics. This subcategory consists of two nominal variables, namely Ideational and Material, each taking the values of “yes” or “no.” The latter grasps the article’s usage of the material factors, either in the form of a dependent or independent variable, for explaining the international phenomenon, while the former measures the status of the ideational factors in the article’s investigatory framework. Another variable, namely the one of “Epistemology,” relates to the ways the article establishes its knowledge claim, with respective values it might take being “Positivist” and “Non-positivist/interpretivist/post-positivist.”

In addition, the work uses the thematic category of the methodology employed within the article, which comprises eight nominal variables with values of “yes” or “no.” The first variable in this category measures the article's quantitative methodology (Methodology\_Quantitative), i.e., research aiming at quantitative hypothesis testing. The second variable, the one regarding qualitative research (Methodology\_Qualitative), measures systematically organized qualitative data employed to generate new hypotheses or examine deviant cases. The third variable relates to the presence of formal modeling in the article (Methodology\_FormalModeling). It reflects the presence of formal mathematical equations or the use of game-theory decision trees, as well as spatial models. The fourth variable, the counterfactual variable (Methodology\_Counterfactual), assumes an explicit usage of the counterfactual method by the article analyzed. The following variable, namely the Analytic/Non-Conceptual (Methodology\_AnalyticNonFormal), deals with articles that attempt to build a theoretical framework or advance a hypothesis without significant empirical evidence or the pre-existing formal model.

Finally, the last troika of variables in this category deals with measuring the presence of descriptive (Methodology\_Descriptive), policy analysis (Methodology\_Policy Analysis), and experimental methodologies (Methodology\_Experimental). The former pertains to a research design that uses qualitative or quantitative data, with no explicit attempts to test any hypotheses or develop testable generalizations. The second, in turn, measures research design that primarily aims at evaluating policy action options available to tackle specific policy issues. The last variable is linked to experimental research articles that aim to test hypotheses and advance or defend claims.

Another thematic subcategory deals with the character of the thematic, spatial, and temporal focus of the articles under study and their substantial focus and orientation. In this respect, the first set of variables relates to the region under investigation in respective articles, with the nominal values for all variables being “yes” or “no.” Those variables are taken from the TRIP’s codebook and can be consulted by the reader.<sup>780</sup> They roughly correspond to the commonsense regional division of the world, with some specifics of the world geography perception characteristic of the codebook’s authors. Similarly, the issue of temporal focus of the articles is approached, i.e., respective variables and values of “yes” or “no” were taken from the TRIP’s codebook. Additionally, the work employs the variable regarding the policy prescriptions (PolicyPrescription) present in the article, with the same nominal “yes” and “no” values as in all previous cases.

Finally, we arrive at the two last sub-categories composed of various variables with nominal values of “no” and “yes.” The first aims to reflect the issue area (IssueArea) in the article, ranging from international security to methodology issues. In other words, these variables reflect the domain toward which a phenomenon or problem tackled within the

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<sup>780</sup> See: [https://trip.wm.edu/home/phocadownload/trip\\_journal%20article%20database\\_codebook2%201.pdf](https://trip.wm.edu/home/phocadownload/trip_journal%20article%20database_codebook2%201.pdf)



article belongs. An exhaustive list of the variables for this subcategory can be found in TRIP's codebook. Similarly, we approach the substantive focus sub-category (Substantive Focus), which appears to be a further specification of the previous issue area subcategory, and comprises various variables of nominal value found in the TRIP's codebook and ranging from gender to the weapons of mass destruction respectively.

The data from this thematic analysis allows this work to approach several issues concerning peripheral publishing and the sociology of IR in general. First, the spatial perspective allows seeing whether the local scholars are preoccupied with regions of study in their immediate geographical and geopolitical vicinity or aim at a more global level of problematique. This, in turn, allows this work to test the assumption about two theses mentioned throughout this work, namely the US disciplinary hegemony and regional CEE IR.<sup>781</sup> The latter will be expressed as a significant interest of Ukrainian and Belarusian scholars in issues "located" within the regional boundaries of CEE. At the same time, the former appears to be twofold. First, following the US hegemony thesis, we have to assume that as peripheral national IR communities, those communities in Belarus and Ukraine have to thematically emulate the fashions of the disciplinary core, whether comprised just of the US or other Western national IR communities.<sup>782</sup> Similarly, following the existing literature on disciplinary dominance, those journals should contain articles that focus on issues linked to local foreign policy and policy advice, leaving those of high theory to the dominant community scholars. Second, articles in the respective Ukrainian and Belarusian journals should be dominated by the mainstream paradigmatic and epistemological orientations, namely the neo-neo couple and the positivist methodological stance.

Overall, the purpose of this thematic part, as well as the whole empirical section, is to provide data that might allow destabilizing the existing conventional wisdom characteristic of the subfield of the sociology of IR. In particular, it relates to the abovementioned assumption that most of the analyses of the peripheral scholarship are too eager to find proof for the core scholars' beliefs about the periphery, thus reproducing the very disciplinary dominance they are talking about; however, on another level of self-reflexivity. In this sense, its primary purpose is not to prove any hypotheses wrong or provide alternative ones but to show the inadequacy of the analytical framework employed for approaching peripheral disciplines of IR.

#### 4.1.4. Sampling logic

What follows in this subsection is a short elaboration of sampling logic foundations, i.e., such issues as the journal choice, article inclusion-exclusion requirements, and similar requirements put forward concerning references found in the articles. Although the existing body of literature provides sufficient guidance regarding the possible "analogical" sampling of journals for Ukraine and Belarus, the local specifics impose limitations on the current work's ability to implement them fully. In the case of Belarus, there were only two journals focused on issues related to the realm of IR, thus making the sampling procedure apparent and unproblematic, namely including only the *Belarusian Journal of International Law and International Relations*, since the *Bulletin of the Belarus State University* did not fulfill the conventional peer-review process requirement. The Ukrainian case sampling appeared to be somehow more problematic: there were no journals that had a clear IR orientation and a simultaneous explicit peer review policy, necessitating the substitution of the latter requirement with the "next in line" of importance, namely a clear and recognizable connection to the local IR community, thus making this work focus on

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<sup>781</sup> Drulak, Karlas & Konigova, 2008; Smith 2002

<sup>782</sup> Smith 2002

*Actual Problems in International Relations* published by the Kyiv Institute of International relations.<sup>783</sup>

Overall, the requirement for journal publications to be included in the sample was as follows: it should have been a scholarly article, i.e., thematically independent, and have no specific purpose apart from the pure scholarly one. This general requirement, in its turn, produced several specific exclusion conditions: in particular, those journal publications which are structured and commented upon collections of legal acts, international agreements, documents, legal comments, working notes, etc., were excluded. In addition, those journal entries which appeared to be reviews of books or other articles had also been “banned.” Moreover and similarly, journal entries dedicated to specific events and anniversaries did not make it into the final dataset. Finally, journal entries that were conference or seminar reports were excluded from the sample for analysis.<sup>784</sup> On top of this, specific inclusion requirements were applied to the references found in the articles included in the final sample. In particular, a reference was thought to be suitable for inclusion if it was categorized as referring to either an academic journal article or book, thus producing a list of excluded types of references: doctoral dissertations' abstracts; impersonal references (for example, a reference to the whole journal's issue, etc.); references to books and articles without an explicit mentioning of its authors, or editors; organizational reports, think-tank reports, conference proceedings, interviews; references to databases, or data collections (printed or online); newspapers, magazines, non-academic journals (The Economist, etc.).

#### 4.1.5. Data collection

The above-described methods, and in particular, the country case selection, define the nature of the data-collection procedure of this work. Since this work focuses on peripheral national IR communities, one barely expects those journals to be indexed in any of the international publishing databases. More precisely, it concerns not the indexing per se but the comprehensive one that includes an entire article's information ranging from the author-level indicators to one of the article's references. Thus, there is no surprise that this work's data was mostly manually added.

During the author's research visiting period at the Ukrainian Catholic University (Ukraine), a group of eleven coders was formed. Those students came predominantly from UCU's program in Ethics, Politics, and Economics (9 students), with a small fraction of coders coming from UCU's Data Science program.<sup>785</sup> These coders were trained respectively and divided into three groups.<sup>786</sup> The first was entitled with the task of the author- and article-level data extraction (6 coders). Each article was assigned a unique ID number corresponding to the number, issue, volume, and publication date in an ascending manner.

Moreover, the latter were separately recorded for each article, as well as an article's language (Russian, Ukrainian, Belarusian, English, etc.), length of an article (number of pages), and its name (taken from the article's title on the introductory page). This procedure created a set of interrelated sub-datasets suitable for the merged methodological analysis in the subsequent subchapters. When this task was over, the first group moved to the thematic content analysis of those articles, following the rationale mentioned above.

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<sup>783</sup> Malinak et al, 2018.

<sup>784</sup> This sampling requirement affected the APIR journal articles way more significant than those of BJILIR. Around one-tenth of all issues published were devoted to student conferences held at the IIR in Kyiv. Coupled with the anniversary and special theme issues, the excluded fraction of published articles approaches one-fifth of all the published articles.

<sup>785</sup> Being mother tongue speakers of Ukrainian, as well as a near-native proficiency in Russian and an operational understanding of Belarusian, local Ukrainian students seemed to be a perfect choice for the thematic analysis.

<sup>786</sup> A note should be made. As coders for the thematic content analysis were accepted only those students of the EPE program who had successfully passed an introductory course in research methodology and Theories of IR.

The second group was assigned an automated data mining task (2 coders). In particular, a simple program in Python was developed to speed up the reference data extraction from the journal articles. Instances of articles not suitable for automated data extraction and passed to the third group for manual data input.

The third group was assigned the task of “polishing” data, i.e., controlling the results of the text extraction process. The main difficulty in the latter approach, thus making it time-consuming, was linked to preventing text misrecognition in references to authors’ names and surnames and article titles. The articles were taken from websites of the respective journals, namely its archive sections, with most of the articles initially coming in a PDF format (not adjusted for text extraction, thus explaining the low quality of the extracted data).

When the data extraction stage was over, the second and third groups moved to assign values to the variables regarding the language of the referenced sources and institutional and national affiliations of the sources’ authors. The latter was another technically simple but tremendously time-consuming operation. For this purpose, the Google Scholar database was used. A further search was undertaken in cases where respective information was absent in the latter database or coders had some suspicion concerning the information provided. In turn, the latter was wholly intuitional and case-specific, with no strict guidelines concerning the processual dimension. Usually, it will span a simple Google search to define and “calibrate” the author’s institutional affiliation through the respective information located at the institution’s website, the author’s web page, a Wikipedia article, or the referenced source itself.

When this task was over, the second group switched to the second journal, and the third group joined the first in its thematic content analysis task. After one-fourth of the articles from the first journal was processed, the interim review took place, with the author of this work randomly choosing articles coded by the coders and doing a separate coding for them. In cases of significant differences between Coder 1, Coder 2, and the author, additional coding training sessions were planned, with the coder’s respective articles samples recoded by them anew in the aftermath.<sup>787</sup>

When the thematic content analysis of the first journal was over, the abovementioned data processing framework was re-applied to the second journal.

#### 4.1.6. Dataset description

The resulting data set is divided into two parts, one linked to BJILIR and another to APIR. The latter one contains 1172 articles. This set of articles results from the sampling requirements applied to fifty-six journal issues, which chronologically cover the period from 2003 to 2019. The average article length in this part of the data set is 6.5 pages, with the minimum being three pages, the maximum of 26 pages, and the median size is six pages. The respective part of the dataset contains 839 unique article authors, on par with 158 unique institutions of professional affiliation. By extension, this part of the dataset contains 7802 references, with 5305 unique authors being referred to and “located” in one of the 1740 unique institutions of professional affiliation with its country location associated with 80 unique states. Moreover, regarding the type of references contained in the respective part of the dataset, it unfolds as 47673 books and 3124 articles.

The one associated with BJILIR contains 825 articles. This set of articles results from the sampling requirements applied to 65 journal issues, which chronologically cover the period from 2000 to 2019. The average article length in this part of the data set is six pages, with a minimum of 3.5 pages, a maximum of 17 pages, and a median length being

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<sup>787</sup> Articles were divided into sub-samples, with two coders assigned separately to those articles for coding. Intercoder reliability was tested after the abovementioned “control probe,” resulting in a “>75%” value which was later on confirmed for the whole dataset.

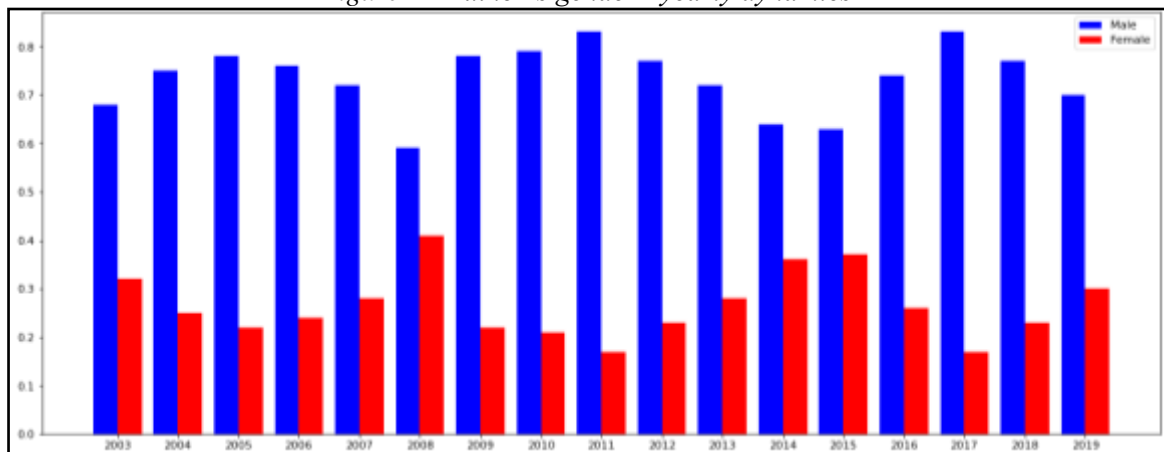
6.5 pages. The respective part of the dataset contains 511 unique article authors, on par with 96 unique institutions of professional affiliation. By extension, this part of the dataset contains 7665 references, with 4147 unique authors being referred to and located in one of the 1320 unique institutions of professional affiliation with its country location associated with 86 unique states. Moreover, the type of references contained in the respective part of the dataset unfolds as 4902 books and 2763 articles.

## 4.2. IR in Ukraine

### 4.2.1. Author Profile Analysis

We approach the Ukrainian IR starting with the author’s profile analysis. In particular, we would go through two essential points regarding the authors of the published articles, namely the rank and position dynamics and those of authorship gender. Although those are not the primary points of the current work, going through some demographic highlights concerning the authors themselves might give complementary data regarding the local discipline of IR. In particular, we look at the current gender divisions present within the publishing dimension of the local IR. Then we move on to an assessment of the “rejuvenation” assumption concerning the Ukrainian IR, namely that it experiences an apparent influx of young “cadres” contrary to the early post-USSR period. And at the end of the subsection, we conclude by evaluating the local institutional diversity on par with the degree of its internationalization.<sup>788</sup>

*Figure 1 “Author’s gender” yearly dynamics*



This graph clearly shows that in the case of the publishing dimension of the Ukrainian IR, there is a definite gender gap. It has been observed throughout the years, with an occasional increase in the share of publishing by female Ukrainian IR scholars. In this respect, it might be said that the Ukrainian case follows the Global trend of male disciplinary predominance.<sup>789</sup> Moreover, it might be said that it is clearly above the average international disciplinary gender ratio. Although the average number of female Ukrainian IR scholars might be higher than that of men, we see a clear inequality pattern in publishing in prestigious local journals. It might be explained by the fact that men occupy higher status and rank positions than women, and the latter are more involved in teaching activities than research and publishing “visibility.”<sup>790</sup> Moreover, this disparity might be

<sup>788</sup> Maliniak et al. 2018.

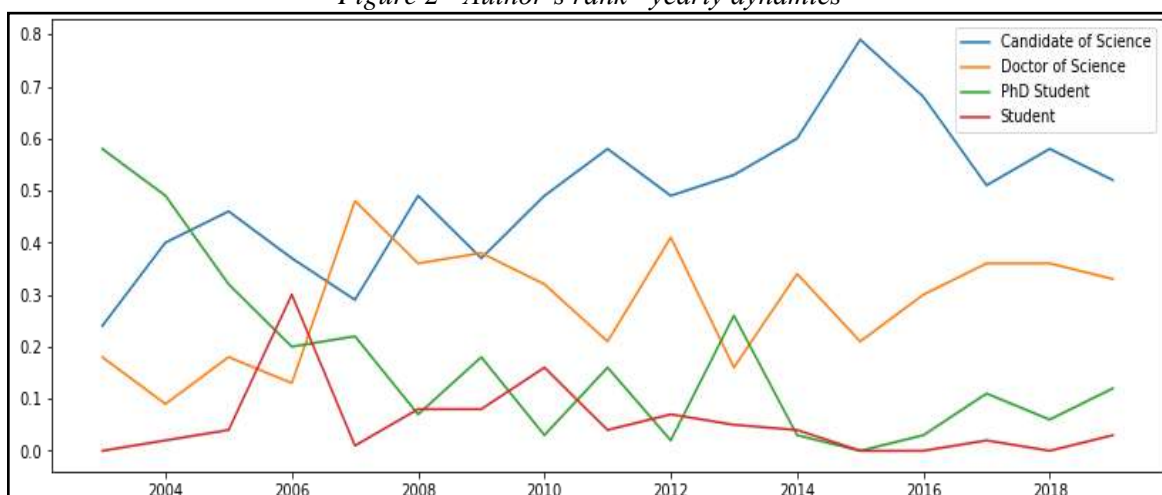
<sup>789</sup> Stewart-Williams & Halsey, 2021.

<sup>790</sup> Miller & Chamberlin M, 2000.

further attributed to the USSR’s disciplinary heritage and respective gender roles, namely that women are good “teachers” but not apt for “research.

In the following graph, one might see the authors’ academic rank distribution dynamics. In particular, the curious point is the steady and easily observable increase in the ratio of those holding the “Candidate of Science” rank. Although being a “lower” research degree, as compared to the “Doctor of Science,” it nevertheless points to the steady “rejuvenation” of the local discipline. The latter is a principal issue since, in the aftermath of the collapse of the USSR and till the early 2000s, academic professions, especially those in social and political sciences, experienced a tremendous decrease in the number of young scholars, thus creating a generation gap in local disciplines across the entire range of social and political sciences.<sup>791</sup>

Figure 2 “Author’s rank” yearly dynamics



However, two points might give an alternative explanation that contradicts the abovementioned one. First, as one might see, the share of articles published by those holding a “Ph.D. Student” rank decreased steadily, with occasional increases in 2007 and 2013. Suppose there was no increase in the requirements for the quality of articles submitted and no conscious editorial discrimination against doctoral students. In that case, we might speak of the “publishing race” among the Candidates of Science.

This is so because, to receive the “Doctor of Science” rank, one has to publish extensively in the major national journals, thus making this dynamic more of the “inflationary” one rather than pointing to the “rejuvenation” of the discipline.<sup>792</sup> Yet, it is only partially true to say that it negates the latter thesis. It might be seen as more of an example of the disciplinary power dynamics in play, namely the permanent and steady substitution of the highest ranks of the discipline. Moreover, the negative character of trends associated with the number of articles published by Doctor of Science and Candidates of Science supports the assumption that what we see here is mainly about the cyclical disciplinary trend of dropout and substitution.

Second, increases in the ratio of articles published by those holding a “Ph.D. student” rank don’t have any meaning within the “rejuvenation thesis” if they are not accompanied by the subsequent increase in the number of articles published by those holding a “Candidate of Science” rank. The opposite case would point to the situation when pursuing a research degree is conditioned by factors other than an academic career.<sup>793</sup> For example, some post-graduate school graduates might pursue advanced

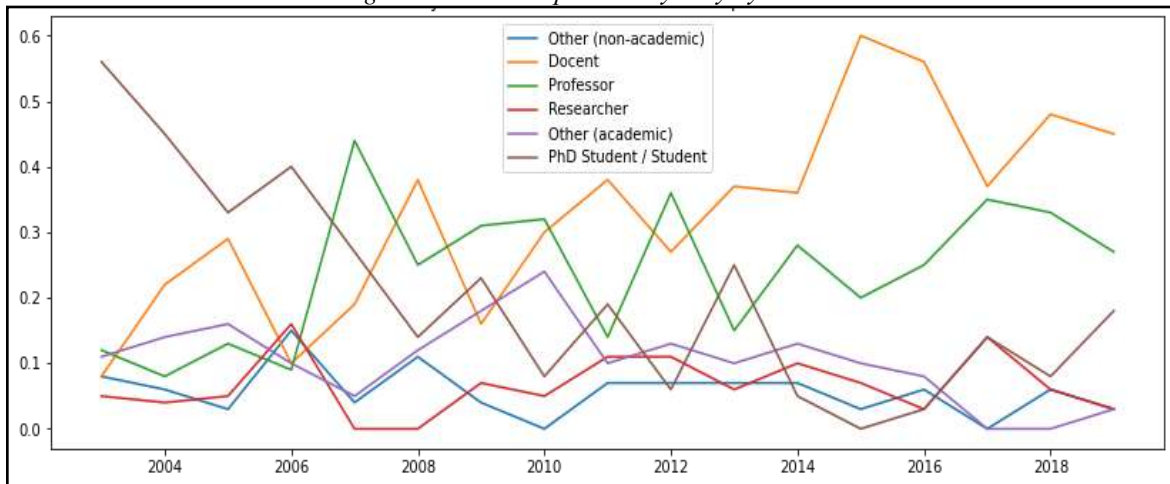
<sup>791</sup> Sabzalieva, 2022; Azimbayeva, 2017; Smolentseva et. al, 2018.

<sup>792</sup> Mirskaya 2012

<sup>793</sup> Mirskaya 2012

research degrees to take jobs outside of academia. Moreover, we might observe the high number of those working outside of academia (government institutions, independent policy-oriented think tanks, etc.) holding the post-graduate level degree and “penetrating” the publishing dimension of the discipline. Thus, we need additional data concerning the abovementioned issue. The following table contains data that might help analyze the status composition of the local profession. In particular, it includes data concerning the author’s position and specifically categorizes those working outside of academia, or holding only minor, instructor-like positions.

Figure 3 “Author’s position” yearly dynamics



This graph confirms our initial “suspicion” regarding the “rejuvenation” thesis. We have seen on the previous charts that it was more about the generation’s cycle rather than the influx of “fresh blood” into the discipline. Apart from demonstrating that the disciplinary mechanism of generations substitution is in place, it also allows us to assume that the primary function of publishing in this journal is not a scholarly one (i.e., research-oriented) but relates to the one of “promotion publishing.”<sup>794</sup> This is explicitly evident if one pays attention to the negative relation between the share of the “Docent” position and “Professor.” Its meaning becomes clear if one keeps in mind the requirement concerning the number of publications for a promotion to the professorship. Moreover, the lack of non-academic publishing adds to the legitimacy of the status publishing assumption.

Finally, we move to the data concerning the local institutional belonging of the authors, on par with one of the number of publications by foreign authors. The former data is straightforward and points to the local core-periphery publishing patterns; however, one must account for a mere demographic explanation before speaking of the core-periphery patterns.<sup>795</sup> The latter is less self-evident. In particular, when it comes to peripheral publishing outlets like the current journal, the lack of foreign authors has to be explained by a mere absence of prestige associated with the journal.<sup>796</sup> However, while there should be an apparent lack of scholars from the “core,” those neighboring IR communities, if one keeps in mind the CEE IR thesis, should be represented quite well. If this is not the case, one might speak of a degree of publishing parochialism and the absence of any confirmation for the regional CEE’s IR thesis.

<sup>794</sup> Heckman and Moktan, 2018; Wawer, 2018; Niles et al., 2020.

<sup>795</sup> CohenMiller & Kuzhabekova, 2018

<sup>796</sup> Drulak, Karlas & Konigova, 2008; Smith 2002

Figure 4 Local Authors' Institutional Affiliation

Author's Affiliation	Frequency
Taras Shevchenko National University of Kyiv	828
National Academy of Sciences of Ukraine	60
The Ukrainian State University of Finance and International Trade	26
Ivan Franko National University of Lviv	22
Odessa I. I. Mechnikov National University	19
Institute of World Economy and International Relations	14
Kyiv National Economic University	13
Vasyl' Stus Donetsk National University	12
V. N. Karazin Kharkiv National University	11

With the local author's institutional affiliation, one might see that high insularity characterizes the discipline in terms of the regional core-periphery framework. In particular, around 941 articles are written by those from institutions located in the Ukrainian capital, with a tremendously high share of authors belonging to Taras Shevchenko University, the home university of the Institute of International Relations, namely the primary educational and research institution in Ukraine.<sup>797</sup> Those coming from regional universities account for around 5% of publications in the journal.

This local insularity is complemented by an evident lack of internationalization in the local publishing dimension, with less than 4% of authors coming from outside the Ukrainian IR. Moreover, as it was mentioned above, we can see those publications by IR scholars coming from the neighboring national IR communities (namely Poland, Belarus, Hungary, Slovakia, Romania, and Russia) account for no more than 44 articles, with around 30% going to those having an affiliation at Russian IR institutions.

Figure 5 Author's Institution (Country)

Author's Institution Country	Frequency
Ukraine	1298
Russia	13
Azerbaijan	8
Poland	7
Germany	3
Greece	2
Turkey	2
China	1
Romania	1
Bulgaria	1
Moldova	1
Canada	1
Italy	1
Japan	1
Hungary	1
Netherlands	1

If combined, the rest of the “neighbors” publishing participation is lower than that of Russian IR scholars alone. This fact allows us to suspect some particular linkage between

<sup>797</sup> See: <http://www.iir.edu.ua/en/institute/history/>



the Russian and Ukrainian IR communities, with explanations ranging from the soviet heritage/tradition to the one of a regional disciplinary hegemon.<sup>798</sup>

Thus, based on the afore-described data, we might conclude that from the author profile perspective, the publishing dimension of the Ukrainian IR can be described as characterized by several features. First among them is pronounced gender inequality in terms of disproportionately prominent articles published by male scholars compared to their female colleagues. Second, the published dimension might be described as one of a metropolitan kind, with scholars from regional universities being misrepresented. Third, one might speak of low levels of disciplinary internationalization based on the number of articles published by foreign authors. Moreover, the insularity explanation might be of primary importance since we would have seen many IR scholars from the neighboring national IR communities if it were about the lack of prestige associated with local publishing. However, since this is not the case, we can speak of the insularity-like publishing patterns characteristic of the Ukrainian IR.

#### 4.2.2. Citation Patterns

##### 4.2.2.1. Geo-national perspective

In this subsection, we focus on the citation patterns characterizing the articles published in the journal included in our sample for Ukraine. Below one can see the yearly dynamics of the reference distribution according to the country of institutional affiliation of the author of the cited source. The data is organized in the following way. Since the absolute values concerning the country affiliation of the cited authors don't make much sense in terms of convenient visualization and analysis (various years and issues have a ranging number of articles and, as a consequence, references), the table represents the yearly dynamics of the ratio of affiliation country concerning references present in the journal.

The first observation one might come up with is that most of the references go to local Ukrainian authors. The apex of this trend is 2013, followed by an abrupt decline from 2014 to 2015 and the subsequent return to the previous levels. These dynamics might be attributed to the fact that starting in 2015, the journal began publishing most of its articles in English, thus making the first cohorts of submittants change their citing habits due to the assumed "internationalization" of the journal – if not in terms of publication participation, but at least in the scholarship fashions. This assumption would be further evaluated when it comes to the part on the linguistic dimension of the citation patterns.

Another evident trend throughout the years is the steady decrease of references toward the authors institutionally located in Russia. Interestingly, we might connect some positive fluctuations in the latter respect to the domestic political dynamics since those neatly overlap, both in their negative and positive emanations) with the pro-Russian, and more West-leaning political forces in power (either in the presidential office or the parliamentary majority).<sup>799</sup> However, the overall long-term trend is negative, with the aftermath of the occupation of Crimea signaling the intensification of this trend.<sup>800</sup> Moreover, we might see basic levels of referencing towards authors located in the US institutions, which on most occasions was higher than those of their Russian colleagues. The short-lived overall predominance of the US-located authors pertains to the abovementioned case of the switch of publishing format of the journal, either due to the informal editorial requirements or personal preferences of the submitters.

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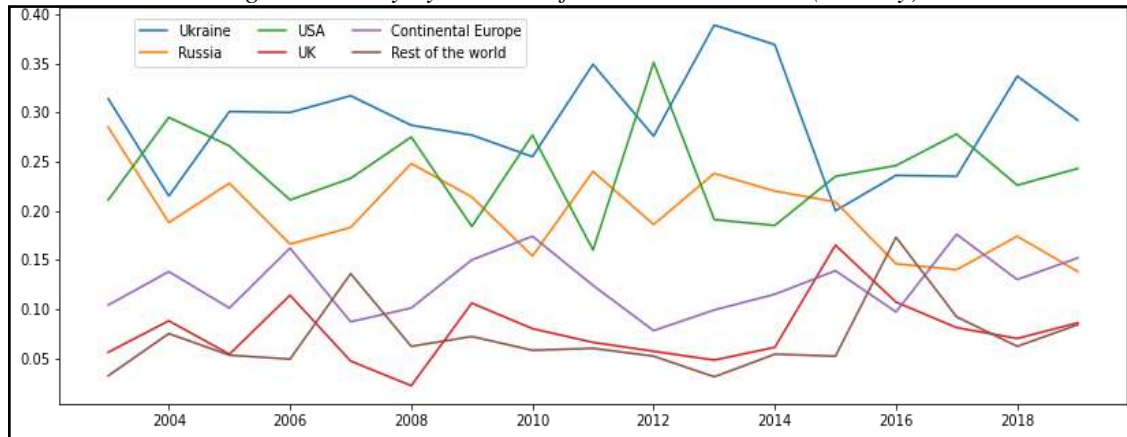
<sup>798</sup> Koval & Gomza 2019

<sup>799</sup> Ibid.

<sup>800</sup> Ibid.

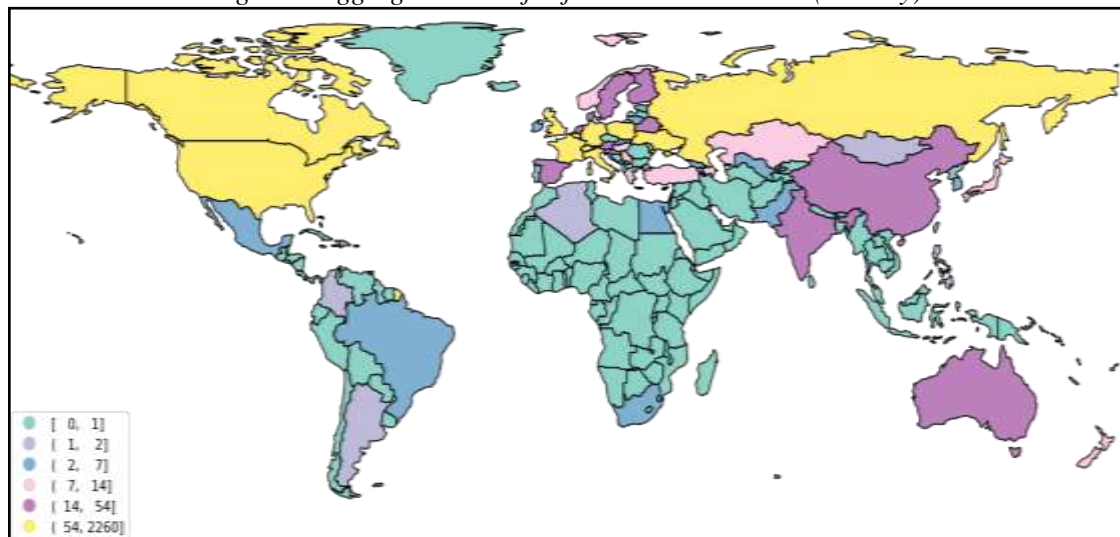


Figure 6 Yearly dynamics references distribution (country)



Overall, one might see that authors in three countries constitute the core of referencing patterns in APIR. To be more precise, it is Ukrainian authors, their US and Russian colleagues, on par with those in continental Europe and the UK. The rest of the world barely accounts for 10% of overall referencing, with two sharp increases of over 10% in 2007 and 2016. Moreover, one might notice that the UK and continental Europe still account for a more significant share of references in APIR as compared to the rest of the world. In this sense, it might be said that the Ukrainian IR confirms (at least in its publishing dimension and about APIR as a representative case) the conventional assumption regarding the Western-centric character of IR conceived in terms of the lack of communication with other parts of the disciplinary periphery, and disproportionately high levels of “recognition” understood as euphemistic with the very practice of citing and referencing.<sup>801</sup>

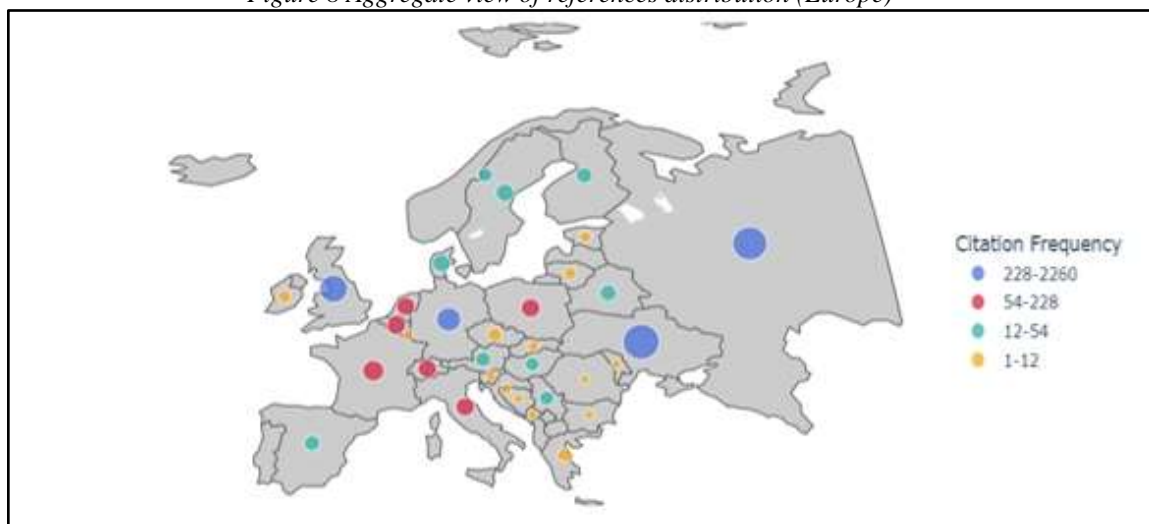
Figure 7 Aggregate view of references distribution (country)



The above map confirms the previous data analysis and provides a better-visualized perspective adjusted to the aggregate scope of data. Categorized into five reference frequency groups, based on citation frequency ranges given in the lower right corner of the map, it allows us to see the “recognition belt” of IR, according to the Ukrainian IR scholars, which roughly runs along the 45<sup>th</sup> and 46<sup>th</sup> parallels north. The spatial visualization of citation frequencies for Europe (the UK included) is of similar peculiarity.

<sup>801</sup> Drulak, Karlas & Konigova (2008)

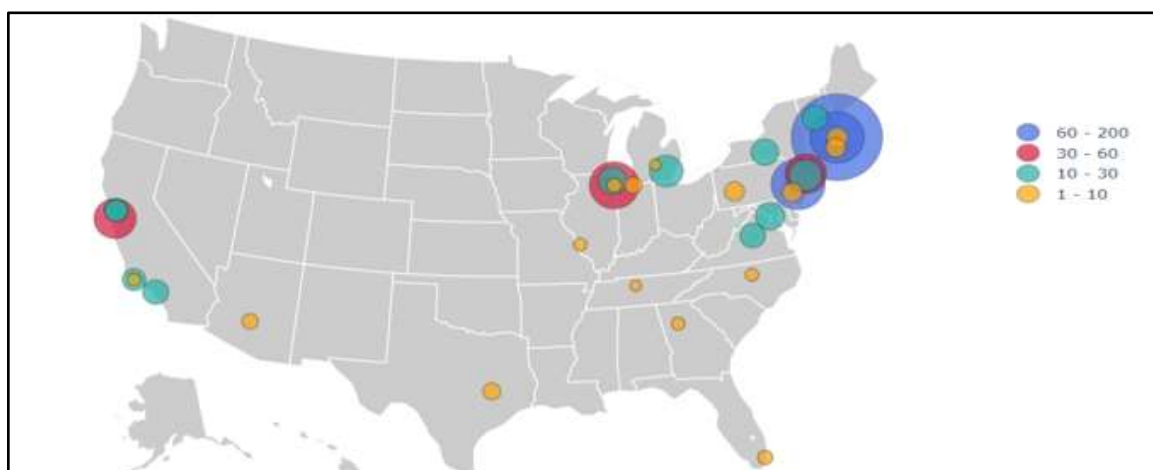
Figure 8 Aggregate view of references distribution (Europe)<sup>802</sup>



Zooming in on the country distribution of references concerning Europe shows a similar pattern of axial distribution. In particular, apart from Russia, it is evident that the Ukrainian IR scholars prefer citing other scholars from the UK and Germany, with most of Western Europe and Poland being reasonably well represented. The Nordic, Eastern, and Central European countries seem to be the least “popular” among Ukrainian IR scholars. In this sense, we might say that the Ukrainian IR, concerning its publishing dimension, clearly follows the ideal type of model of the Western-centric discipline, with the US IR community at its apex and various European national communities acting as the disciplinary semi-core-periphery.

Finally, the core’s internal composition, exemplified by the peripheral citation practices, was interesting for this work. In particular, guided by an insight gained by Kristensen, an attempt had been made to visualize the spatial distribution of references by Ukrainian IR scholars to those affiliated with the US research institutions. The results one can find in the following map.

Figure 9 US references distribution (Institutional of affiliation adjusted)



As one can see, this visualization confirms findings by Kristensen, although from more of a peripheral perspective rather than the whole of the global disciplinary dimension of IR.

<sup>802</sup> The fact that Crimea, on this and all other maps within the current work, is labelled as belonging to Russia stems not from the author’s deliberate choice, but rather from his usage of the Python-language library (Geopandas) <https://geopandas.org/en/stable.html>

In particular, it shows that most of the references go to IR scholars in the geographical area, which might be equalized with the location of Ivy League universities. A peculiar observation in its own right, it serves as an additional argument concerning the heterogeneity of the core and as a hint to the transcommunal character of disciplinary dominance.

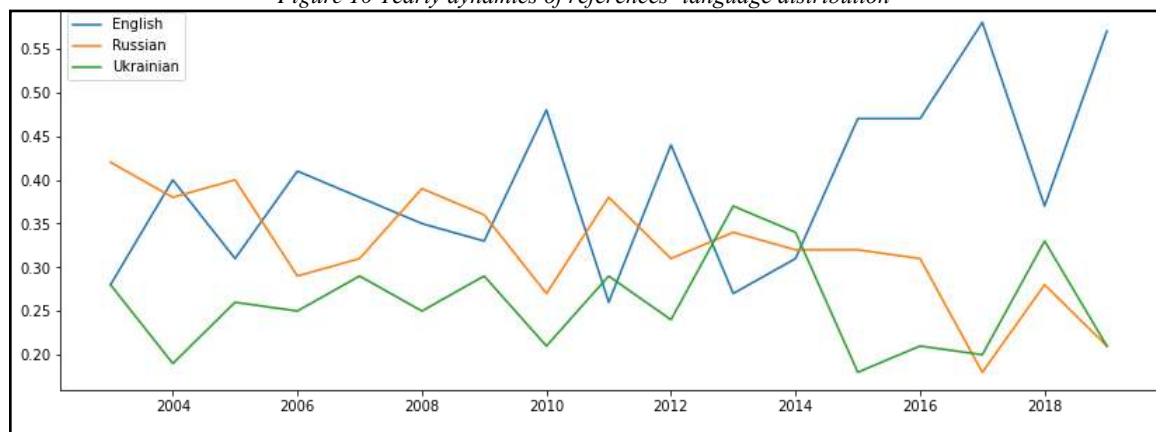
Overall, we might say that the analysis of the geographical dimension of the citation preferences of the Ukrainian IR scholars follows not only the conventional claims regarding the US and Western disciplinary dominance but also confirms some of the more nuanced and quite often understudies issues, such as one of the internal structures of the national US IR community.

#### 4.2.2.2. Linguistic and temporal perspectives

This subsection brings together two additional dimensions available for the citation patterns analysis, namely the linguistic and temporal ones. If the former speaks for itself and refers to the language of the source referred to by the local authors, the next one requires some additional elaboration. In particular, we turn to the time gap between the reference date and the source's publication date. The latter might allow us to investigate some specifics of local scholarship concerning its connection to the "rest" of the discipline internationally. Put differently, the higher the gap, the older the sources used by the local IR scholars, thus allowing us to speak of a disciplinary time lag concerning the international dimension of the discipline.

First, we start with the linguistic dimension. All three languages, Ukrainian, Russian and English, account for almost 90% of all reference languages. In particular, one might see that the Ukrainian language holds a predominant position in terms of the mean of scholarly communication. However, as in all the abovementioned cases, this situation changed starting in 2015 when the APIR journal changed its policy and switched to publishing more articles in English. In addition, we might see an overall negative trend concerning the usage of Russian language sources. Moreover, although the use of Ukrainian language sources is higher than that of English and Russian separately, it never exceeds the latter combined.

Figure 10 Yearly dynamics of references' language distribution



In its own right, this graph does not tell us much about the local discipline, apart from the apparent trend of breaking up with the Soviet disciplinary heritage, its contemporary emanation in the form of orientation on Russian sources, and the subsequent increase in reliance on those coming from the English speaking/publishing countries.<sup>803</sup> However, combined with the reference time gap data, it allows for a more informative and peculiar

<sup>803</sup> Sergounin 2007; Lebedeva 2018

analysis. Yet, before we come to it, we must go through the data regarding the reference time gap dynamics separately.

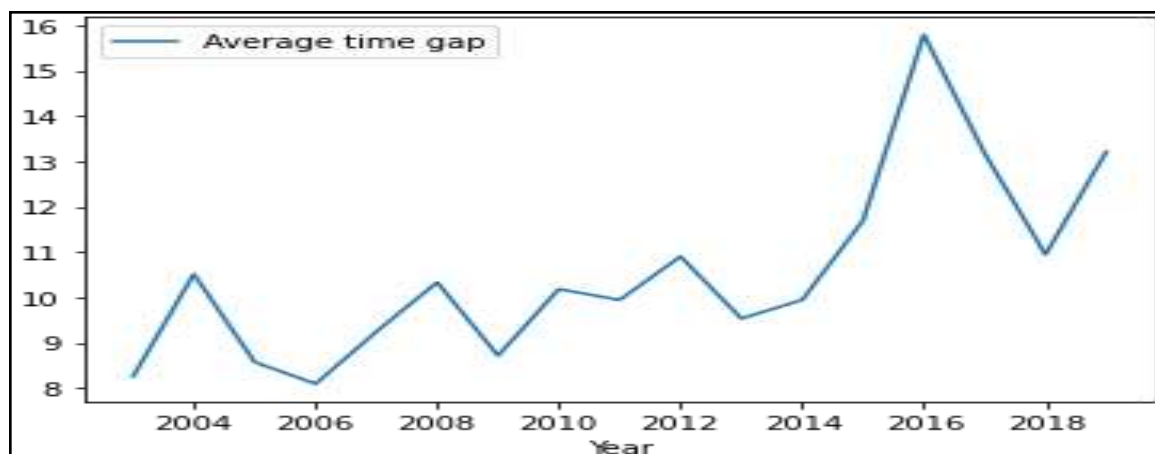
Figure 11 Average values for references time-gap (rank adjusted)

	Candidate of Science				Doctor of Science				Ph.D. Student				Student			
	Book		Article		Book		Article		Book		Article		Book		Article	
Cited country	Mean	Std	Mean	Std	Mean	Std	Mean	Std	Mean	Std	Mean	Std	Mean	Std	Mean	Std
Russia	10.3	4	7	3.4	10.2	5.1	5.5	3.5	10.6	8.1	5.4	1.9	6.2	2.3	8.8	8.3
Ukraine	6.8	1.9	4.3	1	8	3.7	5.5	2.5	6.5	1.9	4.2	1.2	6.9	2.4	7.8	7.2
UK	15.6	4.9	8.8	4.4	11.7	5.6	9	5.2	17.1	6.8	13.2	8.4	9.8	6.6	5	
USA	14.4	4.2	14.2	5.8	18.4	10.5	12.7	6	12.4	10.4	12.6	4.9	16.9	9.8	22	11.8

From the table above, one can notice that there is significant variance in the reference time gap depending on the country of a reference, the author’s position and even the type of source referred to. In particular, the average time gap for the references to authors from the UK and US is higher than that of Russia and Ukraine. Moreover, those references to articles are generally “younger” than those to books, which to some extent confirms the thesis of a journal article as the primary channel of scholarly communication.

Since, on average, the reference time gap is higher for sources originating in UK and US, the change in the publishing policy of APIR in 2015 should have visible consequences for the average reference time gap for the whole journal. The above graph confirms our previous assumption regarding the increase in the average reference time gap at the moment of the publishing policy of the journal. From this, we might cautiously conclude that switching to English as the primary language of scholarly publishing and, by extension, turning more to English language sources leads to a significant increase in the community’s “intellectual lag.”

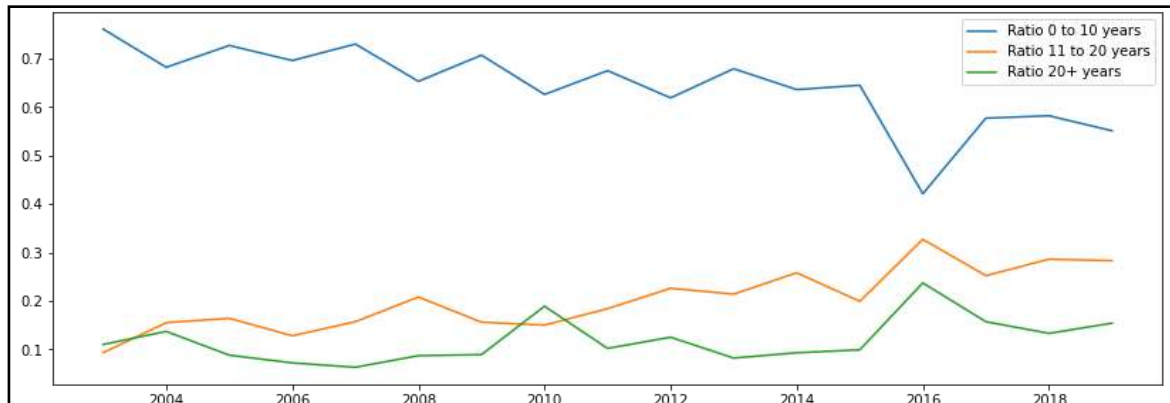
Figure 12 Yearly dynamics for the average time gap



The latter means a situation when an IR community relies primarily on sources and results of scholarly investigations which do not represent the latest “state of the art” literature. This situation can be compared to the technological backwardness of the peripheral countries in WST. However, the average value might still be misleading, thus necessitating an additional look into the data. The following table attempts to achieve this task. This table confirms our initial assumption that the switch toward English language sources increases the “age” of the sources used. We can see an apparent decrease in the sources

within the zero-to-ten years range, with a simultaneous increase in the ratio of eleven to twenty years on par with those of more than twenty years. Thus, we can say that it is not a misleading trend because several outlier cases increase the average time lag value significantly but a meaningful one.

Figure 13 Yearly dynamics for time gap (three time-range sub-groups)



Overall, this subsection clearly showed that the Ukrainian IR, judging by its publishing dimension, presents an ideal-type instance of the disciplinary core-periphery dynamics. In particular, it refers to its lack of connection to other peripheral national communities and overreliance on the core’s disciplinary “product” combined with a simultaneous metropolitan character of the discipline, i.e., the overconcentration of the profession in several local core IR institutions. Finally, it hinted at the transcommunal understanding of the disciplinary dynamics and heterogeneity of the disciplinary core.<sup>804</sup>

#### 4.2.3. Thematic patterns

##### 4.2.3.1. Paradigmatic and methodological perspectives

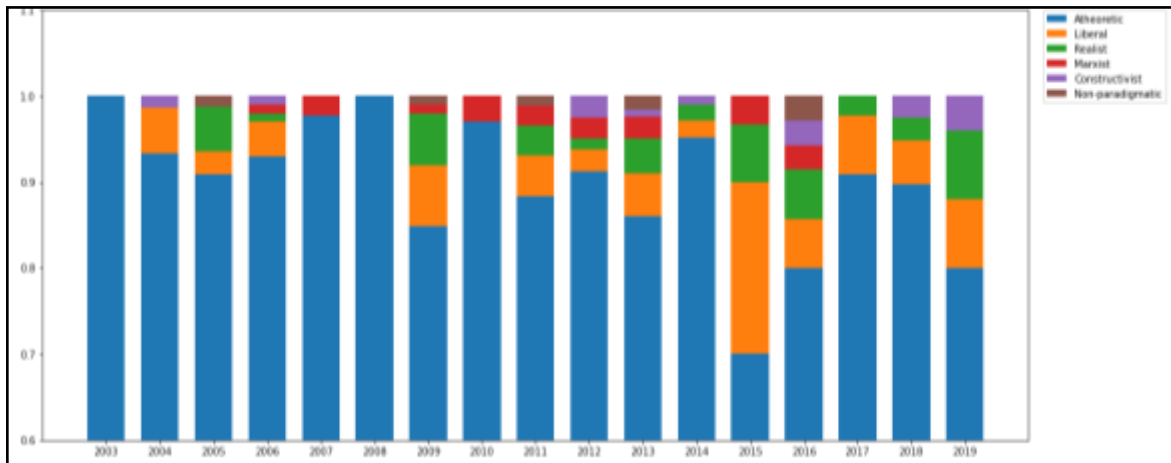
In this subsection, we turn to the thematic patterns characterizing the Ukrainian IR, as exemplified by APIR’s articles. First of all, we start with the paradigms category due to its direct linkage towards two claims in the disciplinary sociology, namely the dominance of the US IR community through promoting the disciplinary orthodoxy in the form of the neo-neo nexus and another one pointing out the misleading character of the previous thesis due to the actual diversity of the field characterized by the presence of various non-mainstream approaches, such as, for example, neo-Marxism.

In the following figure, one might see that most of the articles analyzed appear to be atheoretic, meaning that they do not employ any theory to frame their hypothesis testing or appear to be purely descriptive. From this graph, we cannot explicitly confirm the US dominance thesis about the neo-neo nexus or the diversity claim. Instead, we might somehow put doubt concerning the diversity thesis since although Marxism and Constructivism are present in almost all of the years combined, they do not exceed the ratio of Realism and Liberalism.

Moreover, paradoxically, the three significant decreases in the number of atheoretical articles overlap with the above-described change in APIR’s publishing policy, thus making us suspect a connection between following the core’s disciplinary fashions and the theory building and “theory thinking” as such.

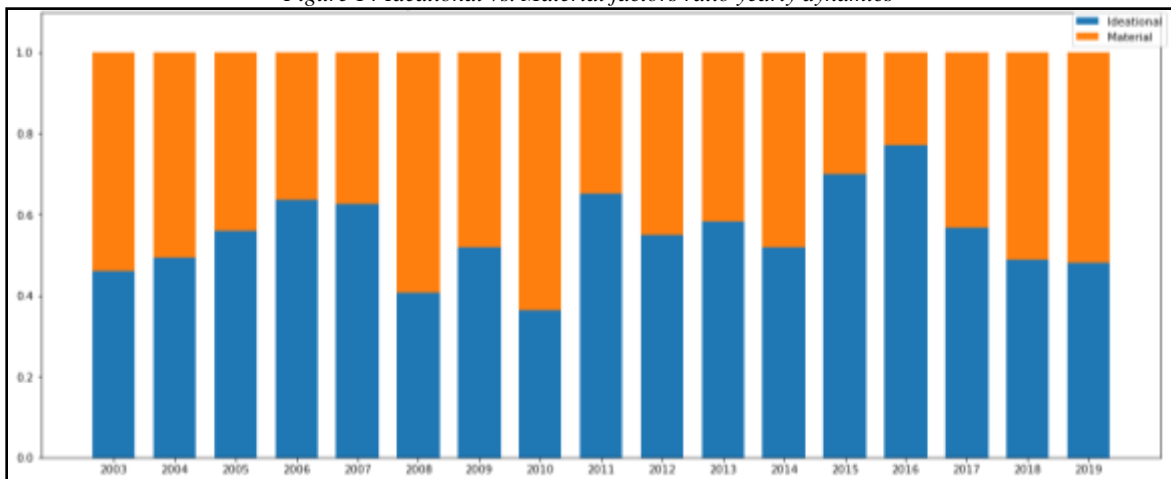
<sup>804</sup> See subsection 3.2.2.4

Tab. 4.1 Paradigms ratio yearly dynamics<sup>805</sup>



The following graph shows us the ratio of articles adhering the explanatory primacy to either ideational or material factors in world politics. Similar to the previous ones, it offers a picture that barely subscribes to the conventional view of the US disciplinary dominance as expressed in the priority of the material factors acknowledged by the peripheral scholars.

Figure 14 Ideational vs. Material factors ratio yearly dynamics



This graph shows us the ratio of articles adhering the explanatory primacy to either ideational or material factors of world politics. Similar to the previous ones, it offers a picture that barely subscribes to the conventional view of the US disciplinary dominance as expressed in the importance of the material factors acknowledged by the peripheral scholars.<sup>806</sup> Here we might see that non-material factors, on average, are admitted by most Ukrainian IR scholars as having explanatory primacy.

The latter observation is even more paradoxical and ironic if one keeps in mind that most articles, categorized according to the paradigm belonging, are of the atheoretical type, with only a few significant increases in paradigmatic thinking. It might be an additional hint that the same categories used by the sociology of IR concerning the “paradigmaticity” and the dichotomy of material vs. ideational factors assume the core-like way of thinking about the discipline.<sup>807</sup>

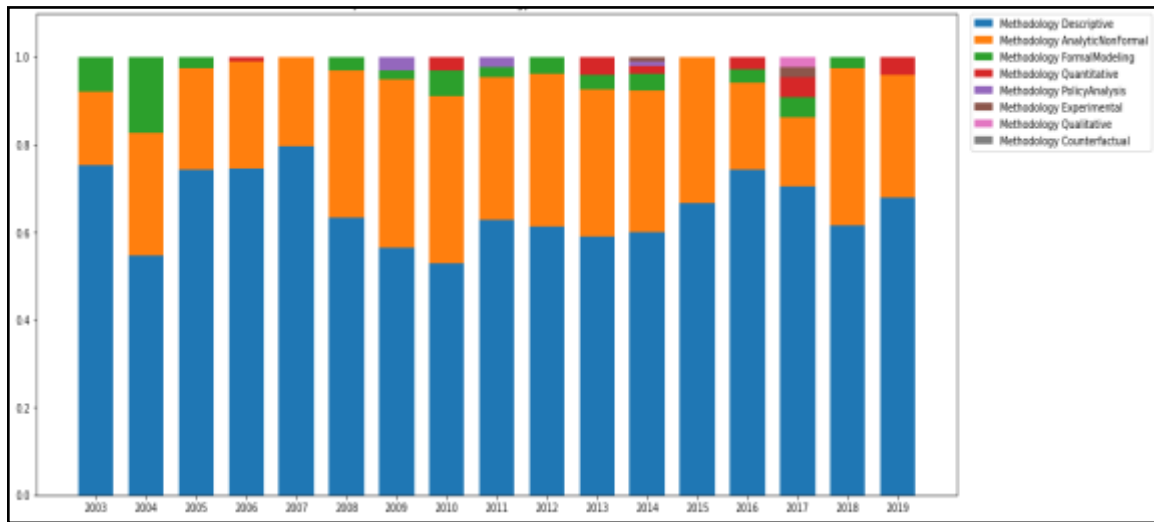
<sup>805</sup> The adjustment value is 0.6 for the y-axis

<sup>806</sup> Maliniak et al 2018; TRIP 2020

<sup>807</sup> Alejandro 2020



Figure 15 Methodologies ratio yearly dynamics



The dynamics of methodologies employed give us an additional reason to think of the most popular assumptions of disciplinary sociology as unsuitable for analyzing the peripheral scholarship. In particular, one cannot see either the predominance of the quantitative methods and formal modeling, thought of as the conventional benchmarks of the US disciplinary predominance, or one of the qualitative methods or the overall methodological diversity associated with the diverse and pluralistic discipline thesis.<sup>808</sup> In this sense, we might say that the peripheral communities are not working within the framework of the core discipline, thus making the core-like framework of analysis seriously inadequate.

Moreover, the fact that a peripheral community suits the abovementioned framework (with whatever internal distribution of methods, paradigms, and so on) might be the best way to identify the presence of disciplinary dominance. In particular, it means that those in the periphery do not follow the core disciplinary fashions but rather arrive at a kind of non-graspable eclectism, and the peripheral discipline suits the abovementioned categorical framework might mean that it became a part of the semi-periphery/core.

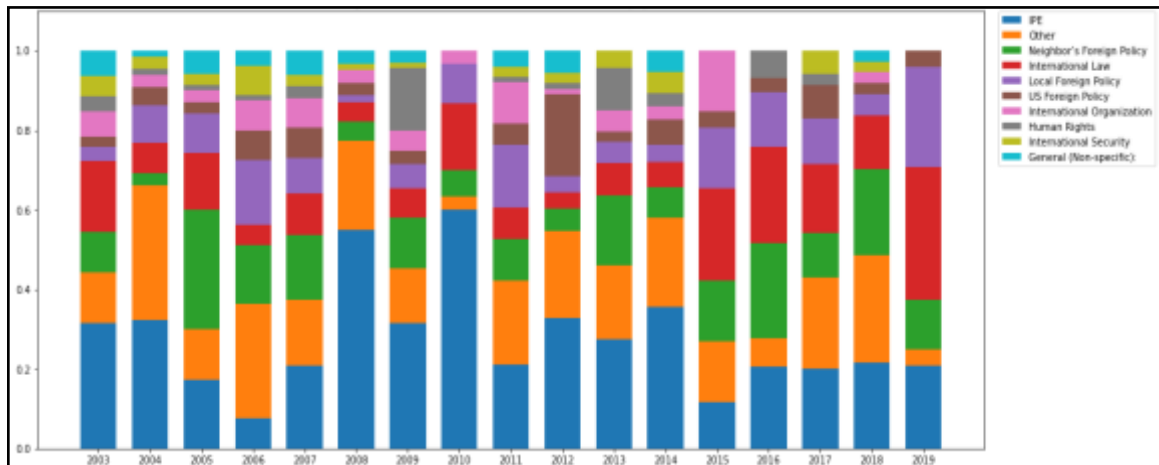
#### 4.2.3.2. Issue area, substantive and regional focus perspective

Now we assess the thematic patterns concerning the issue area of the articles published in APIR. Below one can see its dynamics throughout the period analyzed. Moreover, since almost all of the sub-categories of the issue area appear in the data, it became necessary to narrow the analysis toward the ten most frequent sub-categories (those excluded do not show meaningful value concerning the whole dataset).

Even here, one might notice that sub-categories “Other” and “General,” if combined, comprise nearly half of all articles in the yearly perspective and some instances, close to three quarters. It is an additional plausible argument about our previous observation that peripheral scholarship differs significantly from the discipline’s core. In particular, it relates to the fact that in terms of the thematic orientation of the articles published, it does not follow the framework which is more natural and widespread within the core and semi-core of the discipline.

<sup>808</sup> Rengger 2015; Aydinli & Biletkin, 2020

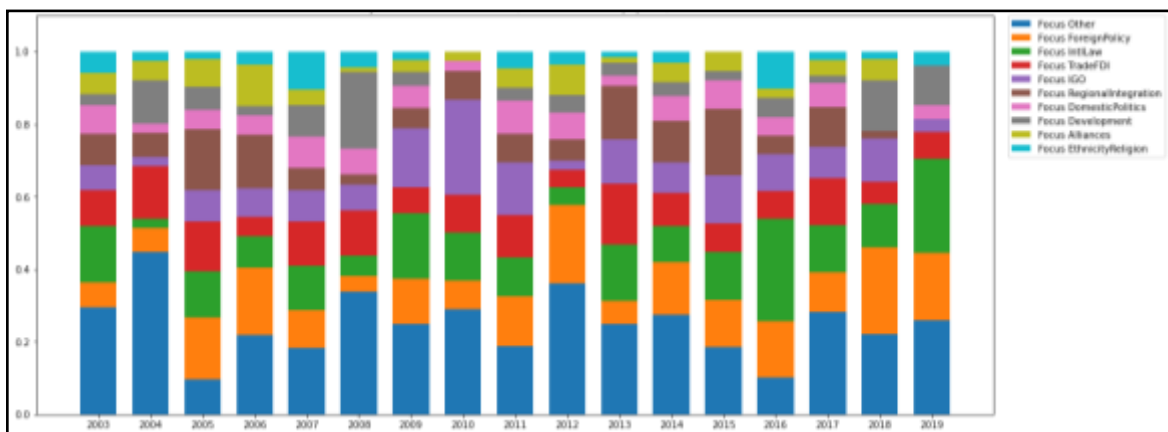
Figure 16 Dynamics of the ten most frequent “issue area” sub-categories



Yet, this is too general speculation, while the data contains more than this. In particular, we might point to an apparent “legal-economic” orientation of the articles coupled with a significant number of articles preoccupied with the local, neighboring country(-ies), and US foreign policy.

The latter thematic preoccupation is peculiar since it is present in all of the years and ranks relatively high compared to other issue areas (ranking lower and excluded). In this manner, judging by the above thematic pattern, we might conclude that the local discipline appears to be more of a policy-oriented activity rather than a scholarly and non-applied “enterprise.” Surprisingly, this observation agrees with the literature on other IR communities within the European disciplinary periphery.

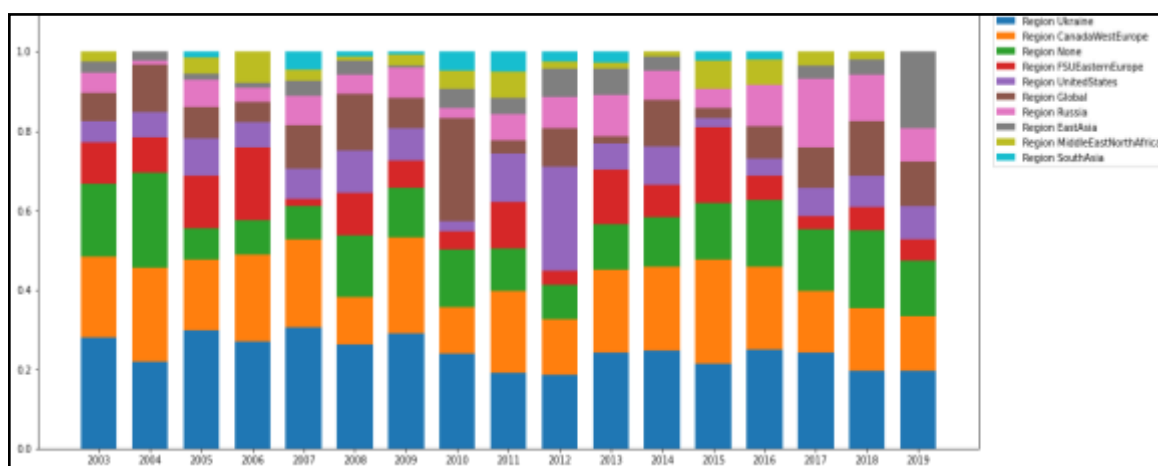
Figure 17 Dynamics of the ten most frequent “substantial focus” sub-categories



Considering the previous graph, there is no big surprise that articles focused on foreign policy, trade, and international law comprise almost one-third of all articles yearly. Domestic politics, international organizations, and regional integration comprise one-third of the most frequently published articles. Finally, as in the case of issue area categorization, the sub-category “Other” covers a significant share of articles being the largest sub-category each year. Similar to the issue area data, the substantial focus categorization shows us the same pattern characteristic of peripheral IR communities, preoccupied more with practical issues about the demands of its country.

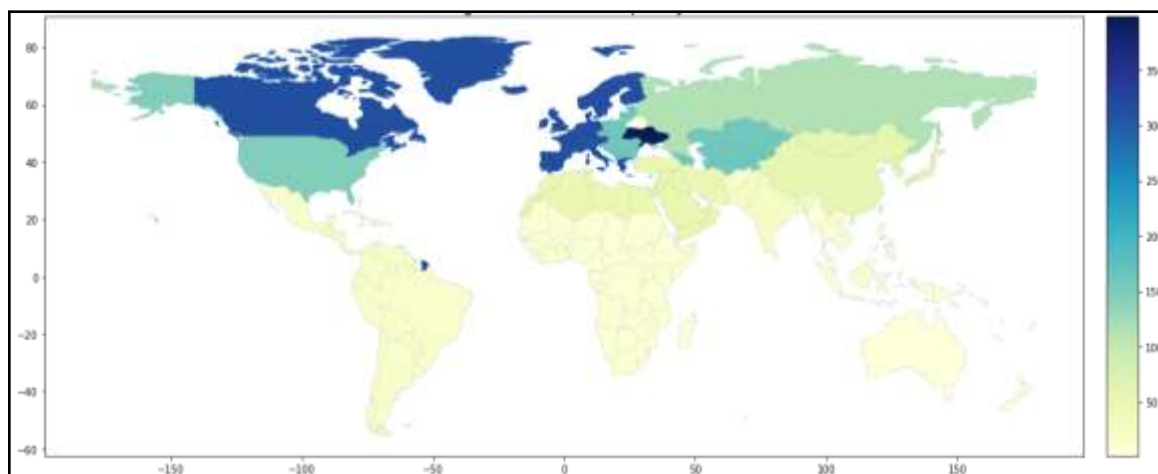


Figure 18 Dynamics of the ten most frequent “region of focus” sub-categories



We conclude this subsection by looking at the dynamics of the region of the focus category. The fact that Ukraine is the primary “regional” focus of local authors is no big surprise. However, there are several quite peculiar trends. In particular, Canada and Western Europe, if combined with the US, give us a yearly ratio similar to the one of Ukraine itself, meaning around one-third of the whole sample. Moreover, the FSU region, or in other words, Ukraine’s regional location itself, is only fourth in terms of its share in the overall sample and is still equal to or less, even if combined with that of Russia, than the frequency of articles focused on Western Europe and Canada. Only starting with the “pre- and post-Crimean” years, the share of FSU and Russia increases significantly.

Figure 19 Region of focus geo-visualization (aggregate)



Moreover, the US “presence” is quite evident in all of the years, although not dominant, with an occasional substantial increase in 2013. We might conclude that the Ukrainian IR scholars prefer “looking” at the Global level, Western Europe and Canada, or none. On average, the US and Russia’s share in the regional focus is similar, with Russia attracting more attention throughout the last years.

This finding contradicts the results of other similar studies concerning peripheral scholarship. It refers to the claim that IR scholars in peripheral national communities tend to have a local, regional focus, neglecting distant regions and the global level.<sup>809</sup> The case of Ukraine shows that despite a significant share of articles focused on Ukraine and its

<sup>809</sup> Risse et al., 2022

surrounding area, the rest of the world still occupies a larger share. To better illustrate this point, one might find it informative to consult the above map. This map is a visualization of the distribution of the region of study concerning the whole data on APIR.

#### 4.2.4. Merging the two approaches

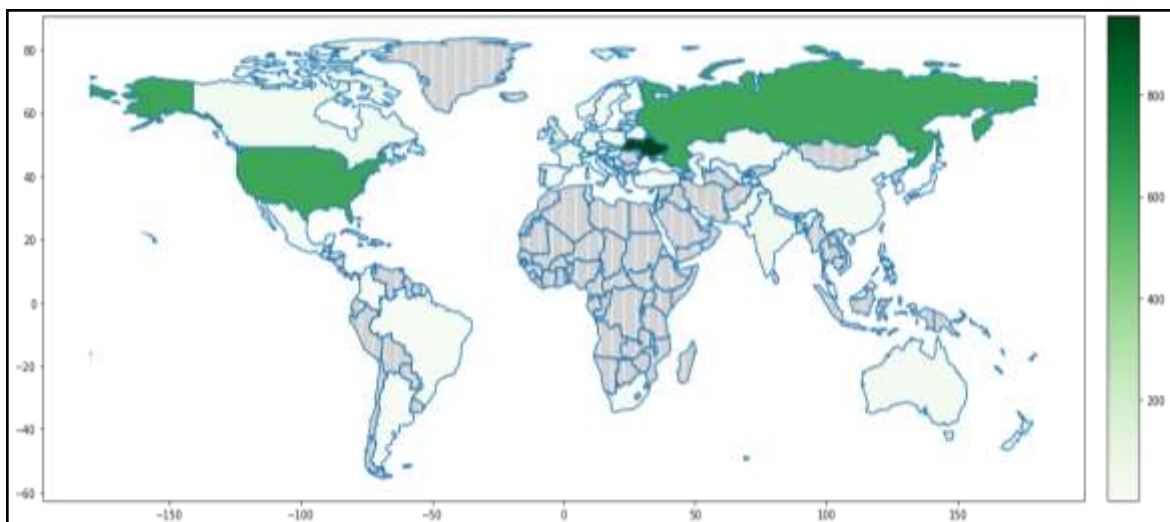
What follows is an attempt to merge the two perspectives and follow the hint given by the previous subchapters of this work, namely the one concerning the transcommunal organization of disciplinary dominance. Following the case, this subsection attempts to employ two conventional methods of disciplinary sociology in a slightly non-conventional way. In particular, it aims to uncover citation patterns not following the author’s institutional or national IR community perspective but along the thematic dividing lines of the published articles.

Put differently and further elaborated, it wants to see how local IR scholars working on various topics and in different disciplinary sub-fields relate themselves to the rest of the global discipline: whom they refer to and, by extension, whom they recognize as an expert, or at least the one whose opinion deserves to be mentioned and refuted. In this way, while staying within the conventional methodological framework of disciplinary sociology, we overcome some limitations stemming from the conceptual stalemate regarding disciplinary dominance. We start with the six most frequent substantive focus subcategories analyzed concerning the country affiliation of the most frequently referred authors in respective articles.

##### 4.2.4.1. Substantive focus six sub-categories and “reference country.”

Here one can see that in the Other sub-category, the geographical diversity of authors mentioned in articles is relatively high despite the apparent predominance of local authors and those from the US and Russian national IR communities. Still, despite this increased diversity, most of the frequently mentioned authors are located in predominantly western countries, with India and Sri Lanka being rare exceptions and such countries as China and Brazil scoring an even smaller number of references.

Figure 20 “Other” substantive focus sub-category visualization<sup>810</sup>

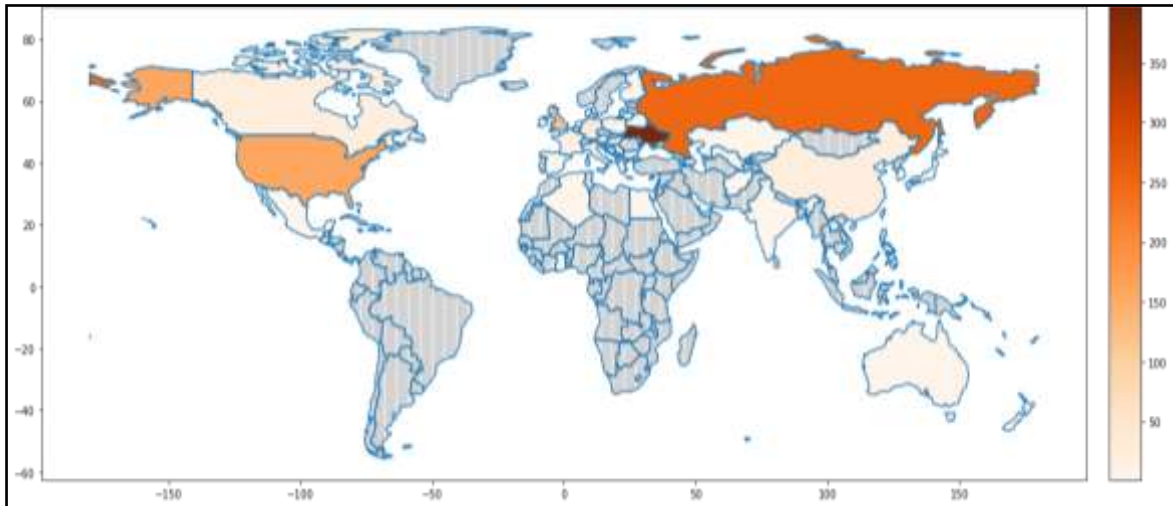


Interestingly, from the moment we move to a narrower substantial focus sub-category, namely “international law,” this “diversity” significantly decreases. It preserves the same

<sup>810</sup> The subcategory mentioned the first appears on the left, while the one mentioned as the second one appears on the right. This logic is preserved for the subsequent graphs. Similar applies to the merge with the “country of institutional affiliation”.

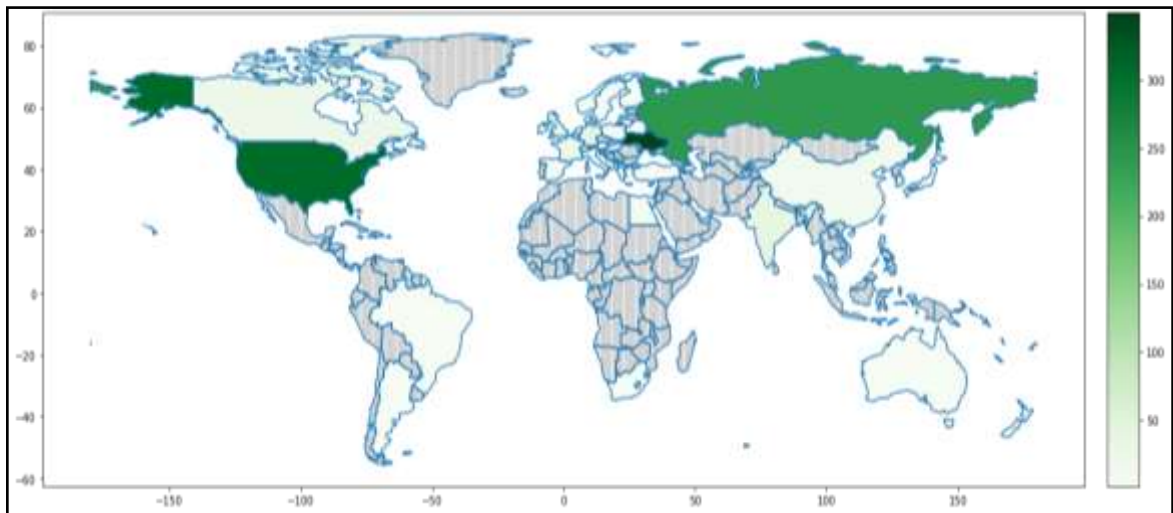
top five distribution as in the previous case, namely, the one of Ukraine holding predominance, although a marginal one, followed by the US and Russia, with the UK and Germany closing the group of countries having a significantly large fraction of institutional representation. However, the number of countries “scoring” a meaningful frequency of references decreases.

Figure 21 “International law” substantive focus sub-category visualization



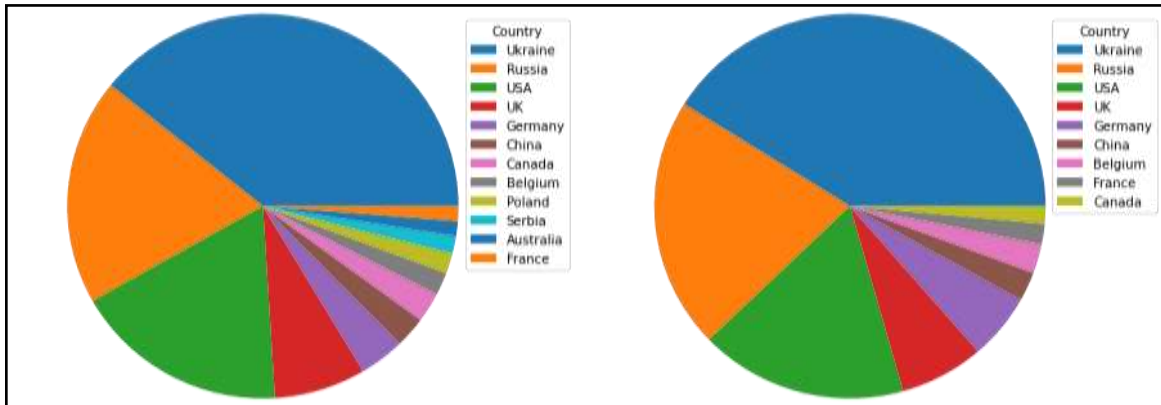
Relatively high levels of affiliation diversity are the case for the sub-category of International Law, with three neighboring national IR communities being represented significantly visible for the first time.

Figure 22 “Trade” substantive focus sub-category visualization



However, even though the local IR scholars are still more frequently referred to than those from the outside, they still account for less than the closest three competitors combined, namely the US, the UK, and Russia. Moreover, as one can observe, most of the geographical “diversity” is still located in continental Europe and the North Atlantic disciplinary core. The situation changes even more drastically if we look at the International Trade sub-category

Figure 23 IGO and Regional Integration

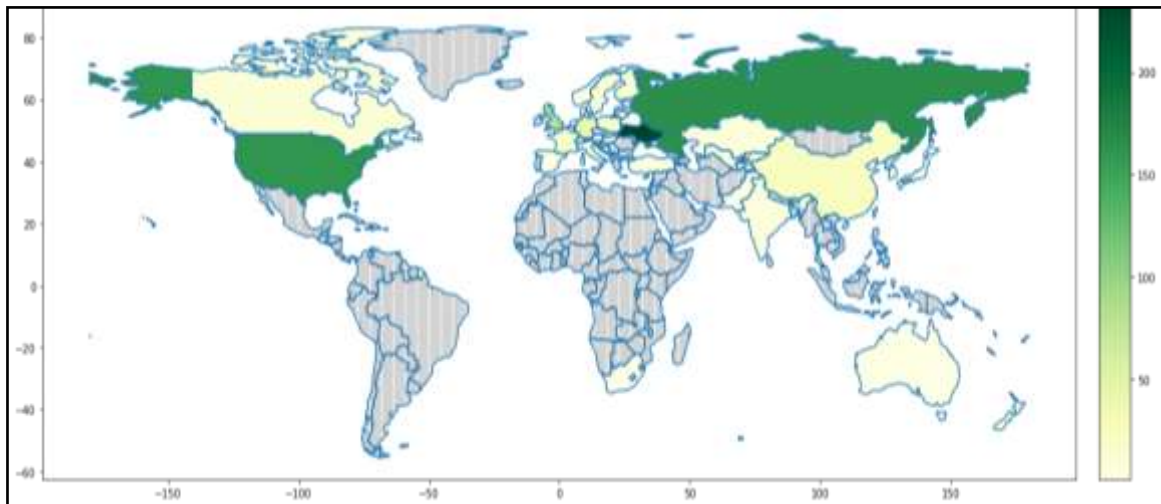


An analogous situation is observed in the last two sub-categories for substantive focus. In particular, while still registering the predominance of national self-references, it in no way corresponds to the overall dynamics with referencing for the journal described in the above chapters on citation patterns. In none of the cases, the ratio of references to Ukrainian scholars goes higher than 40%, while the three closest “competitors” quickly gain a similar share, i.e., Russia, the US, and the UK. Similarly, all countries, apart from China, belong to continental Europe or the West.

4.2.4.2. Issue area (+IR theory) subcategories and “reference country.”

When we move to specific issue areas, then the picture changes dramatically: it is not only that the previous high, although still quite Eurocentric diversity, disappears, but also even the Ukrainian IR scholars themselves cease to be the primary point of reference in a large share of the most popular issue areas. The “local foreign policy” case is the only one that preserves levels of geographical diversity comparable to those found in the previous subsection.

Figure 24 “Local foreign policy” issue area sub-category visualization

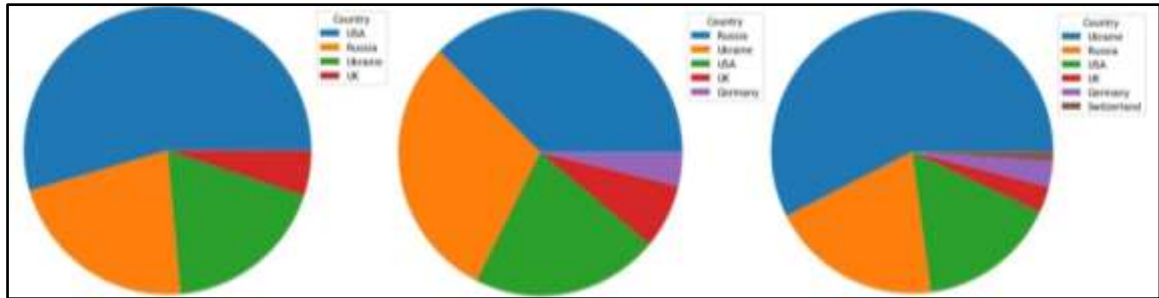


Here we can make an interesting observation. In particular, while talking about the issues of local FP, Ukrainian IR scholars tend to rely heavily, apart from their local colleagues, on those from Russia, the US, and the UK. The latter three stand for around half of all authors concerning foreign policy.



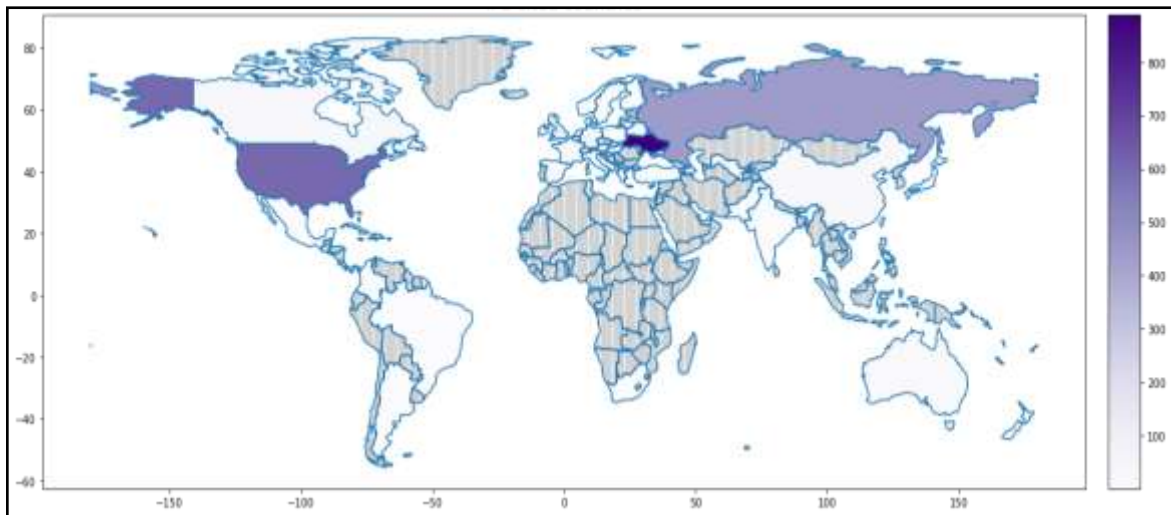
It is a peculiar fact since one expects the local authors to hold a clear predominance in such a thematic area. However, local scholars account for only one-quarter of all the references, and Ukraine’s neighboring countries are represented only by Poland and Russia. Moreover, while thinking about the US FP (the figure below on the left), Ukrainian IR scholars refer quite frequently to their Russian colleagues and, more often than to those from their national community, which is a peculiar observation as well.

Figure 25 US FP, International Security, and Neighbor’s FP issue areas



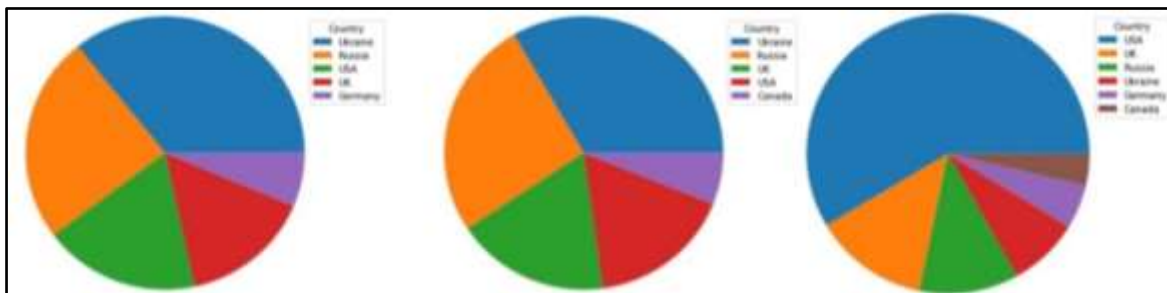
This line of peculiar observations proceeds when one turns to another set of issue area sub-categories. Specifically, what concerns the thematic area of international security (found in the middle above), more references are going to Russian authors, followed by those from Ukraine and the US, with the UK scholars being ranked fourth. Even more surprising is that while writing about the neighbor's foreign policy (and to a significant extent, it goes about Russia), we cannot see any references to other IR scholars from Poland, Hungary, or even Belarus. Instead, Switzerland and Germany occupy the last frequency ranks in this subcategory.

Figure 26 “IPE” issue area sub-category visualization



What is interesting about the above map, which is the visualization of the geographical distribution of references among the articles belonging to the IPE sub-category, is that it roughly corresponds to one of the “Trade” substantive focus subcategories. The first assumption in this regard is that in Ukrainian IR, the subfield of IPE is mainly preoccupied with issues concerning the foreign trade of its country and, to some extent, affected by the pattern of Ukraine’s foreign trade.

Figure 27 IGO, Human Rights, and IR Theory issue areas

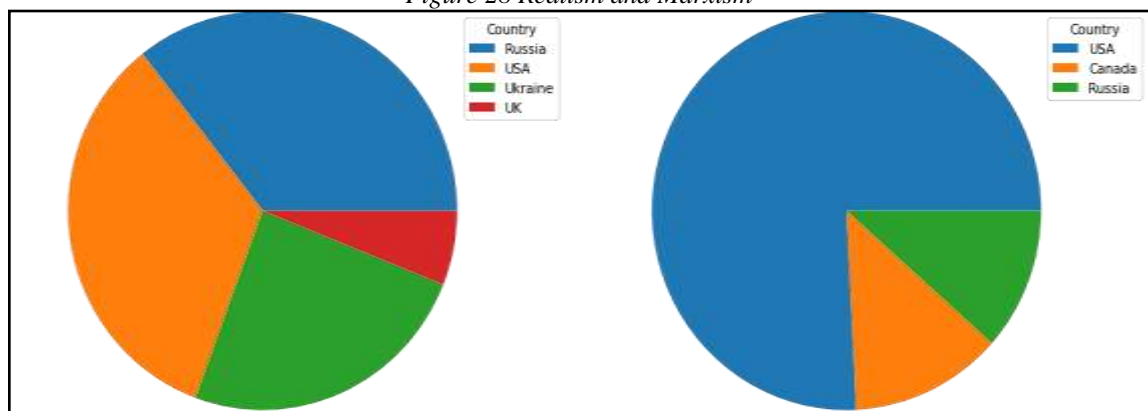


In the abovementioned figures (the first two on the left), one might see that this pattern, namely that of the Ukrainian scholars occupying a significant share of references, is preserved; however, another pattern is even more visible, namely that of the combined predominance of the US, Russian, and UK authors which significantly outweighs that of the Ukrainian.

#### 4.2.4.3. Paradigmatic orientation and “reference country.”

The above charts, including the last one, give us some general idea regarding the local discipline's thematic and citation patterns. In particular, apart from pointing one more time at the fact that the “scholarly division” of labor, at least “internationally,” is organized around issue areas rather than national IR communities, it also tells us more about the issue of disciplinary dominance. In particular, conventionally, the variety of approaches, methods, and paradigms used while studying the international is a sign of pluralistic and diverse discipline, free of disciplinary dominance. However, as the following charts show, this is a slightly problematic assumption.

Figure 28 Realism and Marxism

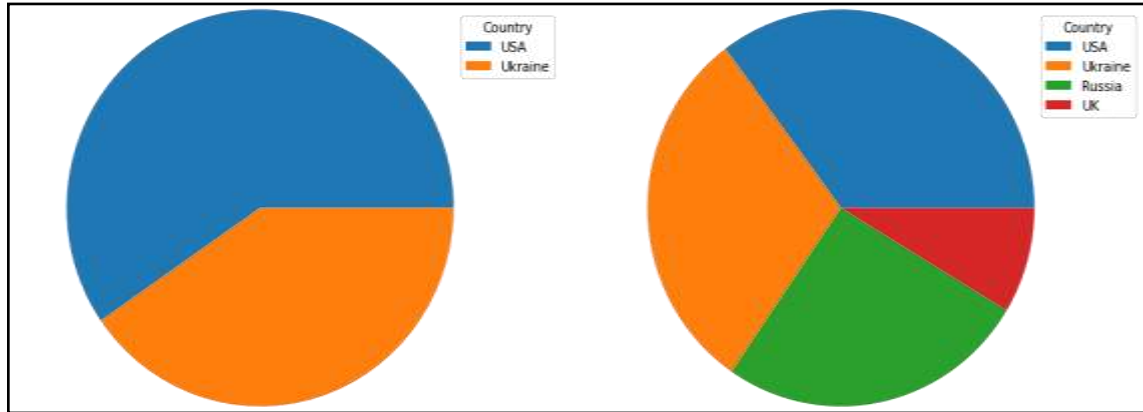


As one can see, articles categorized as Realist appear to be primarily associated with local and Russian scholars. The latter accounts for over half of all references encountered in those articles, with the US and UK scholars having a combined share of around forty percent. Even in the case of references to the latter authors, there is a high chance that those are merely tradition/canon references used by the local authors to hinge on the disciplinary tradition. Thus, the case of “realist” articles puts some doubt into the claim concerning Realism’s status as the hegemonic tradition, i.e., the one associated with and propagated by the dominant IR community, namely the US.<sup>811</sup> This doubt is further intensified if one looks at the diagram for Marxism, a theoretical perspective typically conceived to be critical and in opposition to the disciplinary mainstream, i.e., the

<sup>811</sup> Hendrix & Vreede, 2019

hegemonic mainstream.<sup>812</sup> Here we see that most of the references in the articles labeled as Marxist go to the US and Canadian scholars, with Ukrainian scholars absent and those from Russia accounting for less than one-fifth of all references.

Figure 29 Constructivism and Liberalism



Similarly, we can see that constructivism, also quite often considered a non-mainstream IR perspective, is mostly, at least concerning articles labeled as constructivist, associated with references to US scholars. At the same time, the proportion of references to local scholars rises tremendously.<sup>813</sup> In turn, articles tagged as belonging to the liberal theoretical perspective show a more “normalized” distribution of references, with the US scholars having slightly more references than their Ukrainian colleagues. The case of liberalism points to some rare cases in the sociology of IR, and IR Theory in general, that Liberalism, in its neo-institutionalist emanation, is the actual hegemonic perspective in the discipline associated with the US IR community.<sup>814</sup> However, thus far, the data regarding the paradigmatic orientations of the Ukrainian scholars did not tell us much about this work's primary point of interest, namely the disciplinary hegemony. More precisely, those were just critical half-hints regarding the conventional claims of disciplinary sociology. The most exciting observation can be derived from the data regarding articles labeled as “atheoretic,” and visualization of which follows below.

Figure 30 "Atheoretic" articles category visualized



What one can see on the above map is the higher level of geographical diversity encountered thus far. And it is an exciting finding that might be interpreted somewhat

<sup>812</sup> Maliniak et al, 2018

<sup>813</sup> However, this strange situation with regard to constructivist articles, as well as those Marxists, might be attributed to the low number of articles labelled respectively, thus being pretty uninformative.

<sup>814</sup> Kristensen 2015

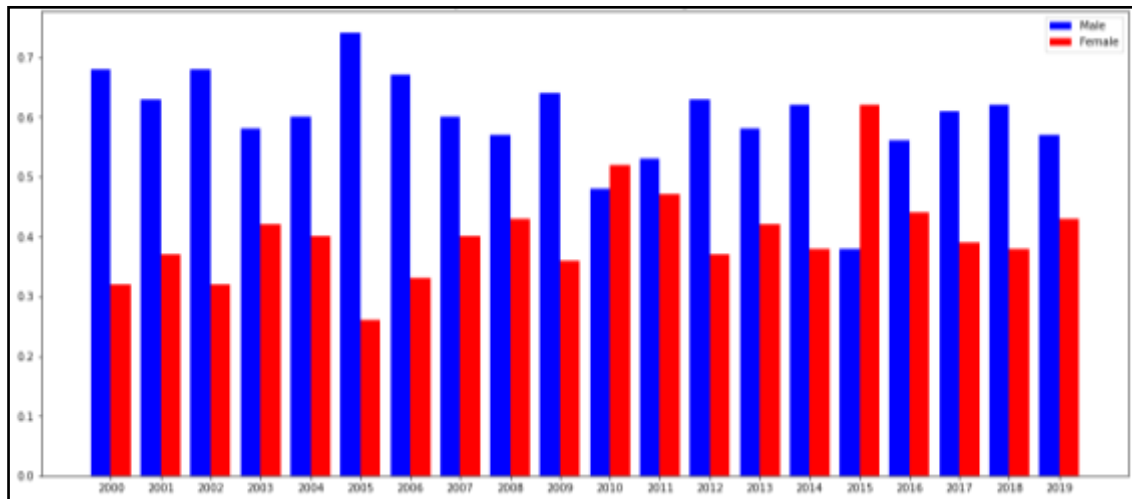
paradoxically. While disciplinary sociology thinks of specific theories and approaches as the primary channel of intellectual hegemony within the discipline, it is the framework of theoretical perspective, be it the mainstream or critical one, which acts as the hegemonic tool concerning peripheral communities.

### 4.3. IR in Belarus

#### 4.3.1. Author Profile Analysis

Like the Ukrainian case, we first focus on two essential points regarding the authors of the published articles, namely the rank and position dynamics and those of authorship gender.

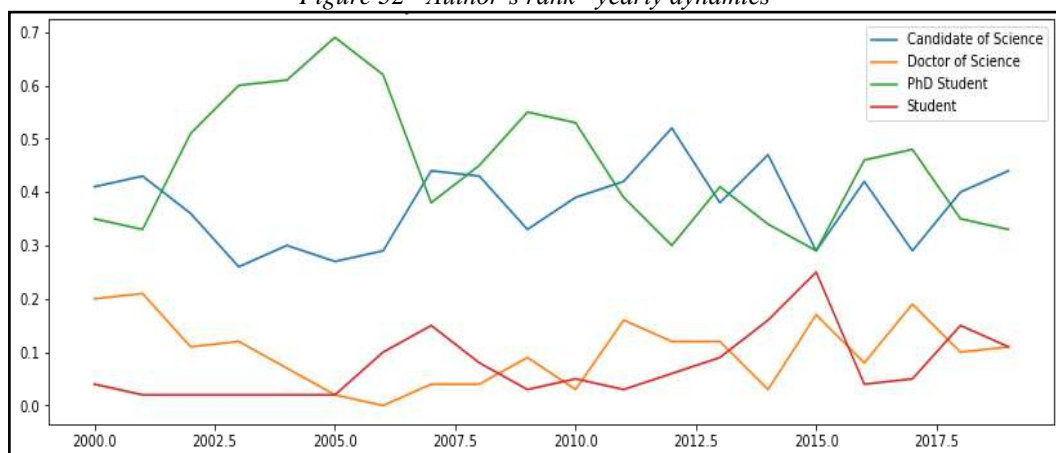
Figure 31 “Author’s gender” yearly dynamics



In contrast to the case of the Ukrainian journal, BJILIR gives us a different picture of the gender composition of the local discipline in its publishing dimension. One might see that throughout the early 2000s, the gender ratio was quite like the one found in the Ukrainian case. However, starting with 2006, we see a clear positive trend regarding gender publishing disparities. Although it remains in place, the overall picture of quite a positive one regarding gender equality compared with APIR.

In its yearly dynamics, the authors' rank ratio gives us an image of the Belarusian IR quite different from that of the Ukrainian one. It pertains to an extremely high number of Ph.D. Students publish their articles in their respective journals. Although the extreme “predominance” of Ph.D. Students are characteristic of only the 2001-2005 period, and with occasional increases in 2009 and 2016, the overall ratio is relatively high.

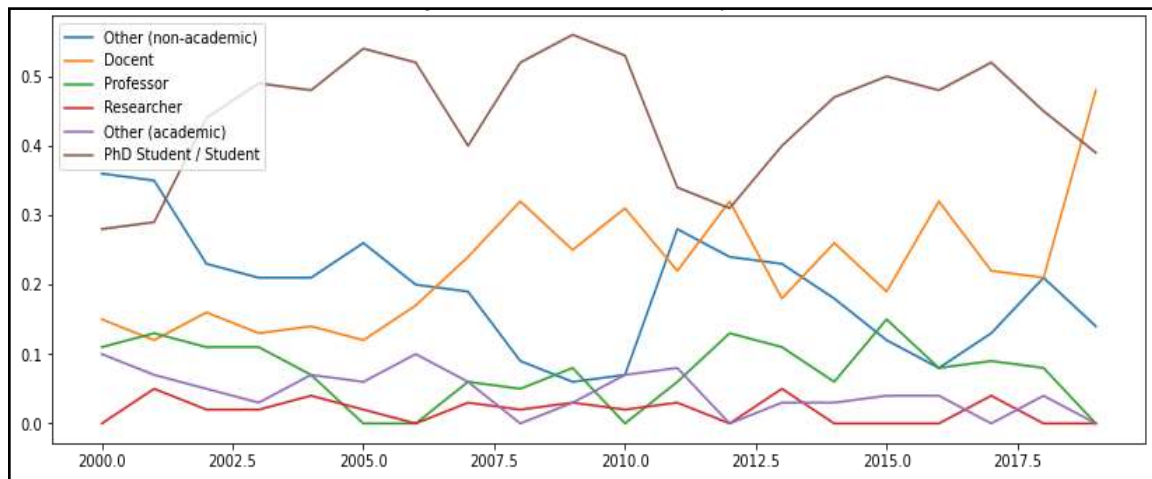
Figure 32 “Author’s rank” yearly dynamics





Without any additional context-related information, one might suspect that this journal is not for senior-level scholarly publishing and acts more as a publishing outlet for students. However, as mentioned in the methodology section, one of the primary requirements for journal sampling was its prestige (locally) and the peer-review mechanism. One possible “alternative” explanation is that a significant part of those ranked as “Ph.D. students” appear to be “Candidates” or, in a more Western manner, part-time Ph.D.<sup>815</sup> Students: those who occupy some research or governmental positions outside of academia and want to pursue a doctorate without interrupting their primary professional activity. If this is the case, the following figure might help us to “locate” those with the help of the “Other (non-academic) curve.

Figure 33 “Author’s position” yearly dynamics



Although the ratio of the “Other (non-academic)” category for the author position is relatively high, overall, it shows an opposite movement as compared to the one of “Ph.D. Student,” thus making us conclude that the high number of the latter type of authors is most likely not connected to the articles published by those pursuing the doctorate through the Candidacy path.

However, the very same figure hints at the high number of works by Ph.D. students. It is evident that the curve of “Other (academic) runs almost in parallel with that of Ph.D. students from the previous figure, and most of the significant increases in the former are parallel to those found in the latter. In this way, we might conclude that the high number of publications by Ph.D. students has a two-fold explanation. From one point of view, it is a difference in terms of scholarly publishing as compared to the Ukrainian case, where early participation in one of the disciplinary dimensions seems necessary. From another point of view, some fraction of those ranked as Ph.D. Students come from academia but do not hold full-time Ph.D. student status.

Figure 34 Local Authors’ Institutional Affiliation

Author’s Affiliation	Frequency
Belarus State University	565
National Academy of Sciences of Belarus	38
Academy of Management of the Republic of Belarus	35
Ministry of Foreign Affairs of the Republic of Belarus	22
Academy of the Ministry of Internal Affairs of the Republic of Belarus	22
Belarusian State Economic University	20
UNHCR in the Republic of Belarus	15

<sup>815</sup> Huisman, Smolentseva & Froumin, 2018

Military Academy of the Republic of Belarus	12
Grodno State University	11

With the above table, one can see that, as in the Ukrainian case, the Belarusian discipline might be characterized by the same pattern of domestic core-periphery relations, with the metropolitan universities occupying the largest share of the publishing dimension as compared to their regional counterparts.

Most of the authors come from the Belarus State University, one of the two universities having a separate and independent faculty of International Relations (the second one is Belarus State Economic University, however, both in terms of research and teaching orientation, it is focused more in issues about the realm of international economics, rather than IR). Thus, in the case of Belarus, one should keep in mind the relatively small “size” of the local IR community, with fewer universities in general and, by extension, fewer departments and chairs which might be labeled as IR departments.<sup>816</sup> Yet, the initial claim regarding the metropolitan character of the discipline is still generally valid, though for different reasons compared to Ukraine.

And again, concerning the foreign and local authors ratio, like the Ukrainian case, the Belarusian journal shows that in terms of internationalization of publishing, it lags behind the standards of geographical diversity and openness to foreign authors: less than 10% of authors come from outside of the Belarusian IR. However, the neighbor’s participation rate is slightly higher than that of the Ukrainian journal, with the largest share of foreign authors affiliated with institutions in Russia. Interestingly, although the number of Ukrainian IR scholars is low compared to one of the locals, they are nevertheless present in the journal and account for almost half of the number of Russian IR scholars.

*Figure 35 Author’s Institution (Country)*

Author’s Institution Country	Frequency
Belarus	851
Russia	13
Ukraine	7
Kazakhstan	5
Vietnam	4
Spain	3
USA	3
Armenia	3
Tajikistan	2
Slovakia	2
China	2
Poland	2
Turkmenistan	2
Lithuania	1
Japan	1
Switzerland	1
Moldova	1

To conclude this sub-section, we might say that from the author profile perspective, the publishing dimension of the Belarusian IR can be described as characterized by several features. First among them is a clear trend towards gender “neutrality” in the discipline, linked to equal levels of articles published by male scholars compared to their female

<sup>816</sup> BSU 2018

colleagues. Second, the published dimension might be described as one of a metropolitan kind, with scholars from regional universities being misrepresented. Third, one might speak of low levels of disciplinary internationalization based on the number of articles published by authors not belonging to the local or national IR community. Moreover, like the Ukrainian case, the insularity explanation might be of primary importance since if it were just about the lack of prestige associated with local publishing, we would have seen many IR scholars from the neighboring national IR communities. However, since this is not the case, we can speak of the insularity-like publishing patterns characteristic of the Ukrainian IR.

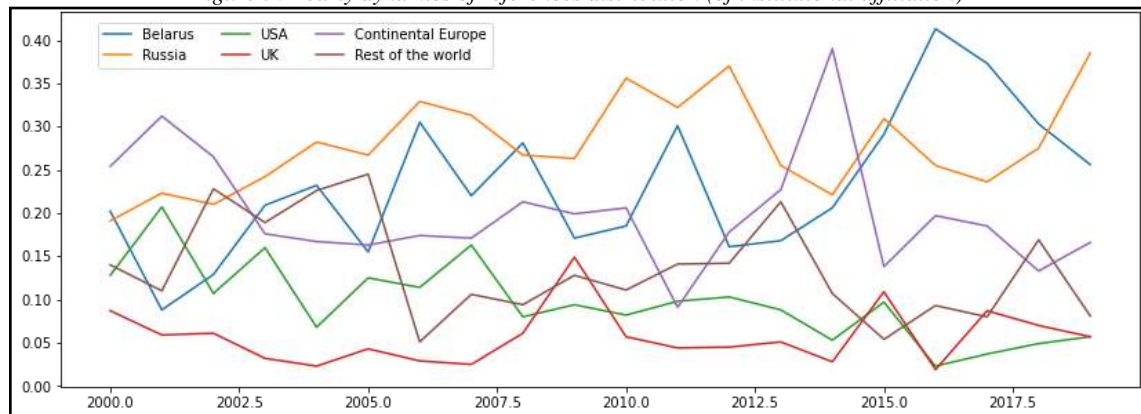
#### 4.3.2. Citation patterns

##### 4.3.2.1. Geo-national perspective

Here, we focus on the citation patterns characterizing the articles published in the journal included in our sample for Belarus. The following figure shows the yearly distributions of references according to the author's country of institutional affiliation. In a comparable manner to the Ukrainian case, there are no absolute values; instead, the figure illustrates the ratio of affiliation country regarding references present in the journal. The first observation one might produce is that most of the references go to Russian authors. At the apex of this trend, on average, the Belarusian authors are referred to slightly more often than their Russian colleagues; however, this is primarily due to the substantial increase in their share for the year 2016, while in all previous years, they were going in a lower parallel to their Russian counterparts. It might be explained by the small size of the local IR community and the linguistic specifics of the country. The first relates to the fact that the local IR community is too small to “produce” enough IR scholarship to serve as a basis for the local study of international politics. The second, in its turn, stems from the previous one and is linked to the fact that although there are two official languages in Belarus, namely, Belarusian and Russian, the latter occupies a predominant position, with close to 90% of the population being bilingual Russophones.<sup>817</sup> In this situation of a lack of local scholarship, it is natural that the local IR community turns to the closest one in linguistic terms in searching for a basis for their scholarly work.

What is also peculiar about the Belarusian case is a low ratio of references to the US and UK authors, on par with quite a high percentage for continental Europe and the rest of the world (at least if compared to the case of Ukraine). In this case, the low ratio of references to scholars from the US and UK might be easily explained by Russian scholarship's “substitution” function.

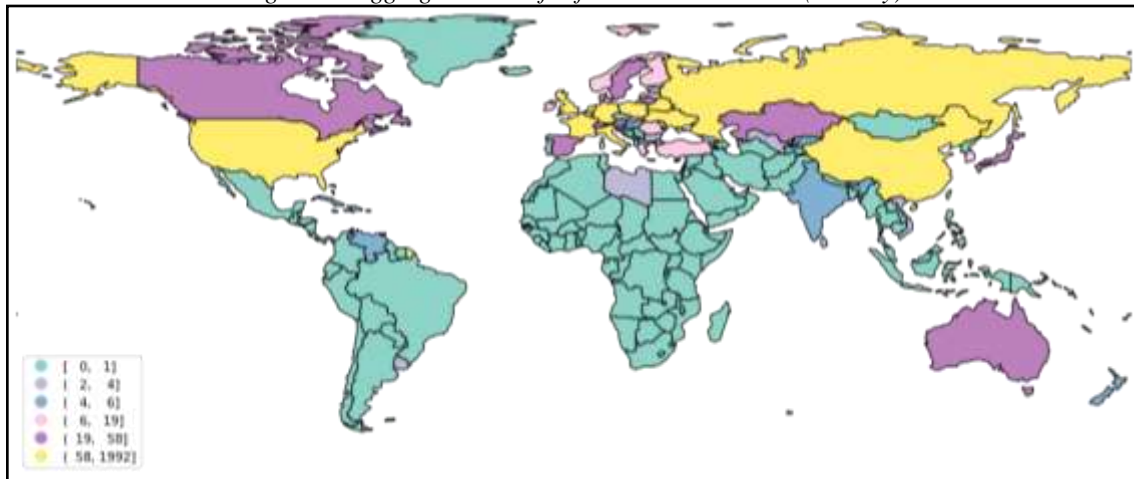
*Figure 36 Yearly dynamics of references distribution (of institutional affiliation)*



<sup>817</sup> Lilja & Starzhynskaya, 2015

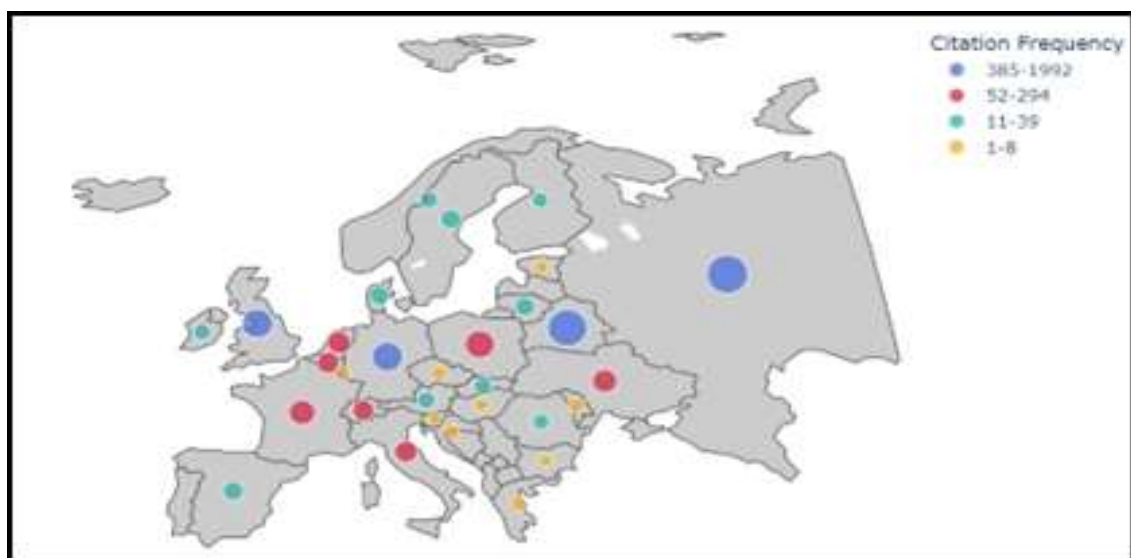
In other words, the Russian IR becomes the mediator of the disciplinary knowledge for a national IR community that is too small to represent itself internationally and “navigate” itself within the international disciplinary dimension, thus, speaking the language of analogies, becoming a “satellite-disciplinary community” which partially loses its communal subjectivity. Even more specifically, it is not included in the international dimension of the discipline directly, even with the status of the periphery. Still, it has to communicate with the latter through another community, which in this case appears to be a Russian one.

Figure 37 Aggregate view of references distribution (country)



The above map follows almost the same pattern found in the Ukrainian case and is adjusted to the aggregate perspective. However, one should mind the specifics of the five reference frequency groups, which do not reflect the Russian predominance. It has been done to reassure a degree of compatibility with the Ukrainian case. In this way, it allows us to see the “recognition belt” of IR, according to Belarusian IR scholars, which roughly runs along the 45<sup>th</sup> and 46<sup>th</sup> parallels north, as in the case of their Ukrainian colleagues.<sup>818</sup> The spatial visualization of citation frequencies concerning Europe (the UK included) is of comparable peculiarity.

Figure 38 Aggregate view of references distribution (Europe)



<sup>818</sup> See subsection 4.2.2.1.

The visualization of the country distribution of references concerning Europe shows a similar pattern to the Ukrainian. Apart from Russia, it is evident that the Belarusian IR scholars prefer citing other scholars from the UK and Germany, with most of Western Europe and Poland being reasonably well represented. The Nordic, Eastern, and Central European countries seem to be the least “popular” among Belarusian IR scholars. An interesting fact is that IR scholars in Belarus cite their colleagues from Ukraine quite frequently while not enjoying the same “recognition” from the latter. This observation might be an additional argument about the lack of a local disciplinary base in Belarus, thus making local IR scholars heavily rely not only on IR scholars from Russia but also on those from their neighboring communities

Thus, we might say that the Belarusian IR scholars, concerning their referencing preferences, follow the conventional model of the Western-centric discipline, however, with a reservation concerning the mediatory role of the Russian national IR community.

*Figure 39 US references distribution (Institutional of affiliation adjusted)*



As one has already been expecting, this visualization of the references made by Belarusian scholars regarding IR scholars in the US follows the same pattern as in the case of Ukraine and overall confirms the findings by Kristensen.<sup>819</sup> It adds one more time to the overall assumption regarding the heterogeneity and hierarchical character of the assumed hegemonic community.

Overall, we might say that the analysis of the geographical dimension of the citation preferences of the Belarusian IR scholars follows not only the conventional claims regarding the US and Western disciplinary dominance but also confirms some of the more nuanced and quite often understudies issues, such as the one of the internal structure of the national US IR community. Moreover, it runs in parallel with that pattern characteristic of the Ukrainian IR scholars adding even more argumentative weight to the assumptions mentioned above.

#### 4.3.2.2. Linguistic and temporal perspectives

Following the structural logic of the previous sub-chapter, this sub-section brings in two additional dimensions available for the citation patterns analysis, namely the linguistic and temporal ones. As in the case of the Ukrainian IR, it might allow us to “see” a little bit

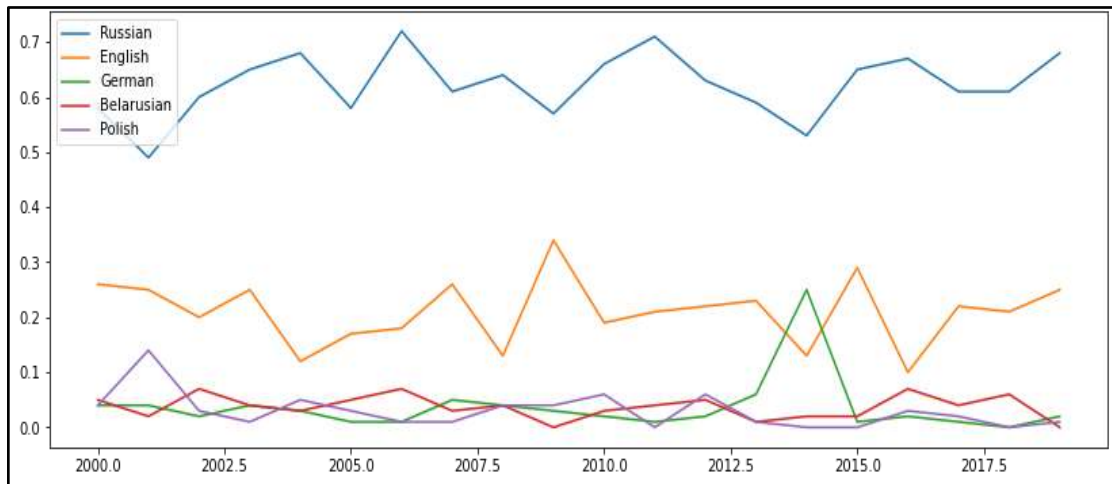
<sup>819</sup> Kristensen 2015



more about the local discipline despite the limitations imposed by the methodological framework of this chapter. However, if, in the case of Ukraine, it allowed us to trace the channels and mechanisms of inclusion and exclusion from the current state of disciplinary affairs, in the case of Belarus, the investigative focus slightly changes. Instead of focusing on the English language references, it is more interested in confirming its earlier suspicion of the Russian IR community as a disciplinary mediator, allowing another national community to access the international dimension of the discipline. It does not require us to change the logic of the analysis. Refocusing attention on the Russian language sources is sufficient.

First, we start with the linguistic dimension. The most frequent reference languages are the five languages, namely Russian, English, German, Belarusian and Polish. However, Russian and English account for over 90% of all reference languages. One might see that the Russian language holds a predominant position in terms of the primary mean of scholarly communication. However, contrary to the Ukrainian case, the overall dynamics are stable, with only several occasional and insignificant decreases in Russian language share.

Figure 40 Yearly dynamics of references' language distribution



This figure alone local discipline, apart from the already mentioned inclination to refer to the Russian language sources. However, one must remember that this is not a country-adjusted visualization. It significantly gives high value to the Russian language due to the inclusion of works by Belarusian scholars written in Russian. Thus, before one considers the visually observable correlations between the source language and the respective time gap, it seems necessary to consult the country of affiliation adjusted table regarding the average time gaps.

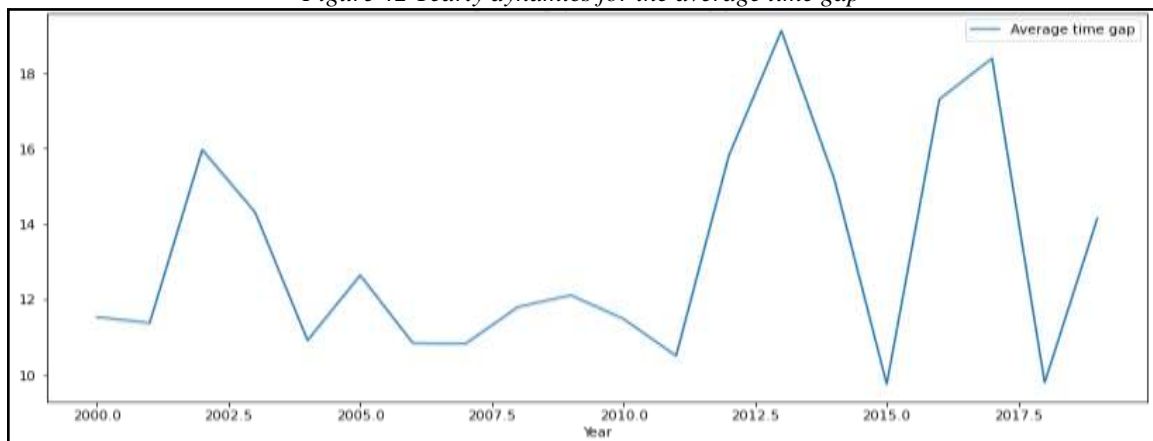
Figure 41 Average values for references time-gap (rank adjusted)

	Candidate of Science		Doctor of Science				Ph.D. Student			Student						
	Book		Article		Book		Article		Book		Article		Book		Article	
	Mean	Std	Mean	Std	Mean	Std	Mean	Std	Mean	Std	Mean	Std	Mean	Std	Mean	Std
Russia	8.3	4.2	5.1	2.2	7.8	5	4.1	3	7.7	2.9	6.4	3	8.8	3.3	4.3	3.3
Belarus	11	7.1	5	2.7	8.7	6.5	5.4	3.9	7.8	3.2	5.4	3.3	7.3	6	4.3	1.8
UK	20.8	17.1	15.6	16.4	17.8	10.3	19.7	24.4	16.3	6.9	10	6.7	12.4	4.1	12.6	6
USA	12.2	6.6	17.3	17.9	9.6	6.6	12.9	11.9	20.2	14.6	12.1	7.1	6.7	3.8	7.9	7.7
Germany	15.5	14.8	7.4	6.1	17.2	9.5	8.8	6.4	18.5	11.4	12	14.3	21.1	20.2	11.5	6.4

From the table above, one can notice that there is significant variance in the reference time gap depending on the country of a reference, the author’s position and even the type of source referred to. In particular, the average time gap for the references to authors from the UK and US is significantly higher than that of Russia and Belarus.

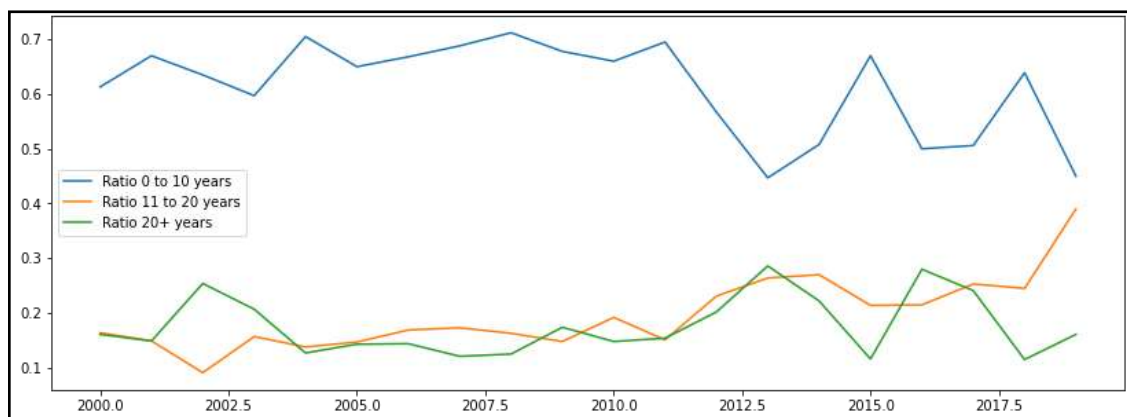
Moreover, those references to US articles are generally “older” than those to books, which is an exciting finding if one keeps in mind that the journal article is usually considered to be the way of communicating novel ideas quickly and efficiently. Finally, the exciting point is that while Ph.D. students generally follow the pattern of their senior colleagues, non-Ph.D. students are showing a completely different pattern, namely the one where the sources originating in the US are comparable, in terms of their time lag, to those originating from Russia.

Figure 42 Yearly dynamics for the average time gap



Here it is possible to see several significant increases in the average time lag throughout the period under consideration. Those increases might be associated with increased usage of German and Polish language sources. In 2001, it might be due to the abrupt rise in the ratio of references in Polish, while German language references might account for the one in 2013. The year 2016 appears to be a more interesting case. We see a decrease in English and Russian-language sources, with a simultaneous increase in Belarusian language references. In this way, it might hint at the antiquarian character of the Belarusian language sources.

Figure 43 Yearly dynamics for time gap (three time-range sub-groups)



Moreover, the last figure shows that occasional references did not condition the increases mentioned above in the yearly value of the average time gap to excessively outdated literature. Only once, around 2001, when there was also an increase in the polish language references, we might see a significant single increase in the subgroup of “20+” sources. In all other cases, it was conditioned mainly by a simultaneous increase in “11 to 20” and

“20+” years sources, thus implying a general rise in the “age” of references rather than an occasional “injection” of extremely old sources which are distorting the available picture concerning the reference time gap.

The linguistic and temporal dimensions of the Belarusian IR present a case that does not allow for straightforward generalizations and conclusions. From one point of view, it clearly showed that those sources associated with IR scholars from the international “core” of the discipline, on average, have a higher value for the time-gap indicator, thus following the logic outlined in the previous sub-chapter on Ukraine, namely the one of lagging concerning the current state of the discipline.<sup>820</sup> However, at the same time, the overreliance on Russian sources, apart from an explicit disciplinary dependency, also shows that the up-to-date Russian language literature compensates for the latter lack of connection to the discipline's core. It, in turn, might be conceived of as a situation when, contrary to the case of Ukraine, the local disciplinary parochialism vanishes in incorporating the local discipline into the neighboring IR communities. Thus, to gain a better understanding of the local discipline, there is an obvious need to move on to analyzing the thematic patterns.

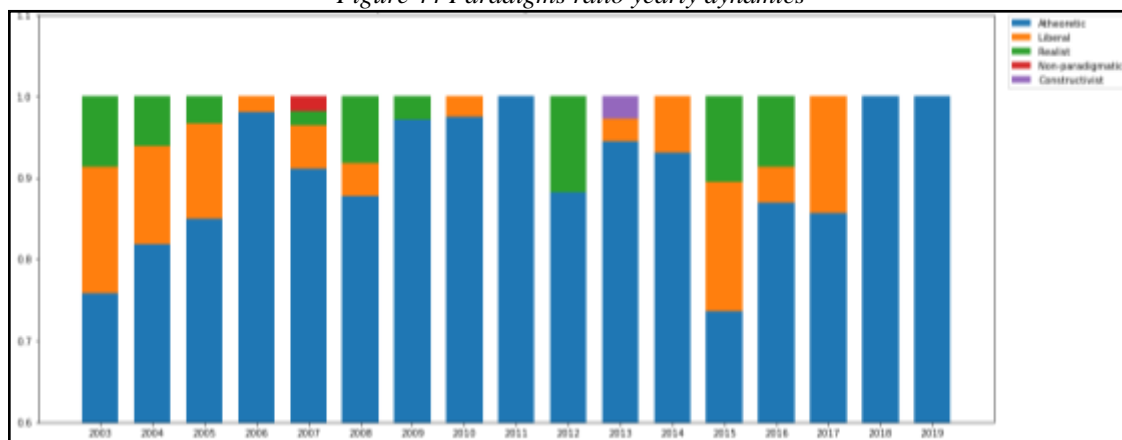
### 4.3.3. Thematic Patterns

#### 4.3.3.1. Paradigmatic and methodological perspectives

In this subsection, we turn to the thematic patterns characterizing the Belarusian IR, as exemplified by BJILIR’s articles. First of all, we start with the paradigms category due to its direct linkage towards two claims in the disciplinary sociology, namely the dominance of the US IR community through promoting the disciplinary orthodoxy in the form of the neo-neo nexus and another one pointing out the misleading character of the previous thesis due to the actual diversity of the field characterized by the presence of various non-mainstream approaches, such as, for example, neo-Marxism.

The following graph shows that the tremendously high number of articles appears to be atheoretic.<sup>821</sup> From this graph, similar to the Ukrainian case, we cannot explicitly confirm the US dominance thesis, the neo-neo nexus, or the diversity thesis. Instead, we might put an already present doubt in the previous subchapter concerning the diversity thesis since this case shows how diversity is conceptualized quite well, making the peripheral scholarship non-existent in disciplinary terms. It is so because when approached with the mainstream framework for assessing diversity/dominance presence within the discipline, it returns results that do not confirm or refute any hypothesis.

Figure 44 Paradigms ratio yearly dynamics



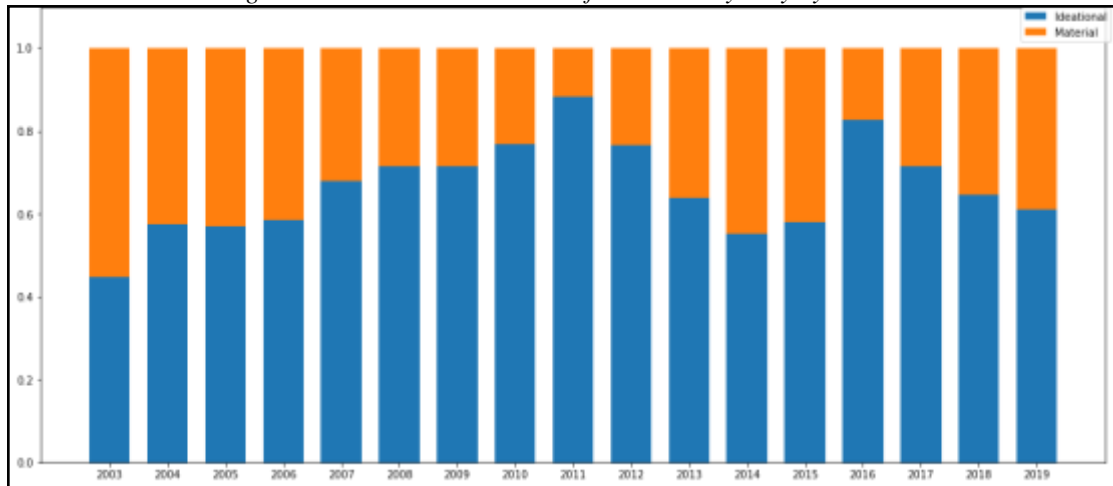
<sup>820</sup> See section 4.2.2.2.

<sup>821</sup> One should keep in mind the adjustment value of 0.6 along the y-axis



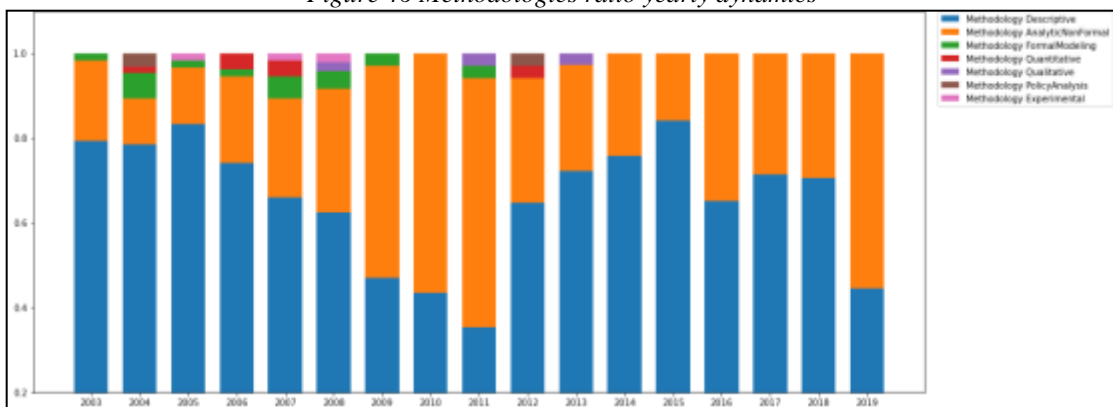
Although the paradigmatic analysis of the articles does not return any significant results, we move to the assessment of the Ideational and Material factors category. Surprisingly, it shows higher levels of ideational factors than material. The Belarusian IR scholars are more idealists than their Ukrainian colleagues, although less paradigmatically framed. Moreover, it points to a lack of intellectual dominance if understood in terms of a widespread application of the materialist approaches to world politics.

Figure 45 Ideational vs. Material factors ratio yearly dynamics



And again, as in the Ukrainian case, the dynamics of methodologies employed give us an additional reason to think of both of the most popular assumptions of disciplinary sociology as unsuitable for analyzing the peripheral scholarship. In particular, similar to the Ukrainian case, one cannot see either the predominance of the quantitative methods and formal modeling, thought of as the conventional benchmarks of the US disciplinary predominance, or one of the qualitative methods or the overall methodological diversity associated with the diverse and pluralistic discipline thesis. We can see the relatively large presence of analytic non-formal modeling methodology, which allows us to assume that it comes from the fact that most of the local IR scholars used to be trained within the history departments.

Figure 46 Methodologies ratio yearly dynamics



And again, as in the Ukrainian case, the dynamics of methodologies employed give us an additional reason to think of both of the most popular assumptions of disciplinary sociology as unsuitable for analyzing the peripheral scholarship. In particular, similar to the Ukrainian case, one cannot see either the predominance of the quantitative methods and formal modeling, thought of as the conventional benchmarks of the US disciplinary predominance, or one of the qualitative methods or the overall methodological diversity associated with the diverse and pluralistic discipline thesis.

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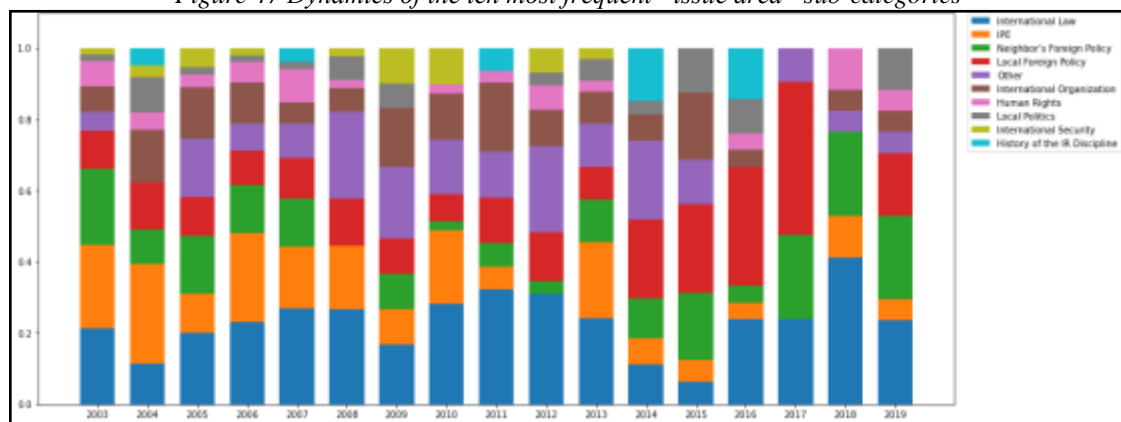
Apart from this, we cannot but recapitulate our assumption and say that the peripheral communities are simply not working within the framework of the core discipline, thus making the core-like framework of analysis seriously inadequate. Moreover, similar to the conclusion derived in the subchapter of Ukraine, we might say that the very fact of a peripheral community fitting the abovementioned framework (with whatever internal distribution of methods, paradigms, and so on) might be the best way to identify the presence of the disciplinary dominance.

#### 4.3.3.2. Issue area, substantive and regional focus perspective

Now we assess the thematic patterns concerning the issue area of the articles published in BJILIR. Below one can see its dynamics throughout the period analyzed. Moreover, since almost all of the sub-categories of the issue area appear in the data, it became necessary to narrow the analysis toward the ten most frequent sub-categories (those excluded do not show meaningful value concerning the whole dataset).

Overall, the pattern one may find below reminds the one found in the Ukrainian case. In particular, it pertains to the thematic pattern's overall “applied” character, with International Law and IPE occupying the dominant position regarding their ratio to other issue areas. However, there are some meaningful differences. For example, International Law occupies the principal thematic place in the Belarusian case. At the same time, IPE only follows the latter, on par with the local foreign policy thematic category being of a higher ratio. The US FP is absent from the ten most popular subcategories. In this sense, we might conclude that the Belarusian IR appears to be even more “practically” oriented than its Ukrainian equivalent. However, this practicality most likely stems not from a “conscious intellectual” choice but instead linked to the higher dependency of Belarusian scholars on state-provided funds. It might also partially explain the absence of the US FP in the list of the most popular sub-categories. Yet, concerning the latter, we might additionally put it as a sign of lower inclusion into the global disciplinary framework, which focuses on the US FP due to the latter’s global importance not just for the discipline itself but its primary subject matter, namely the international.

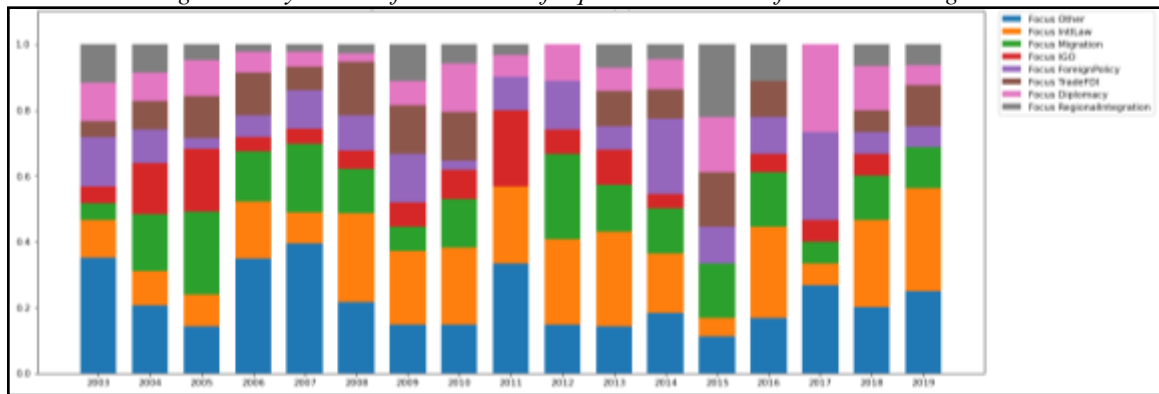
Figure 47 Dynamics of the ten most frequent “issue area” sub-categories



The following figure mostly confirms our previous observations. The general pattern is quite like that of the Ukrainian discipline, focusing on “practical” issues. However, several reservations follow below. First, it is the migration focus. Its large share might be

explained by two interrelated factors, namely the fact of significant number of publications submitted by the authors from the UN Mission to Belarus office, with one of the primary issues for the latter activities in Belarus being the one of fighting illegal immigration and human trafficking; and the very fact of Belarus’ geographic position which makes it one of the ideal spots for the EU aimed illegal migration, and the recent events on the EU-Belarus borders speak for themselves in this respect.<sup>822</sup>

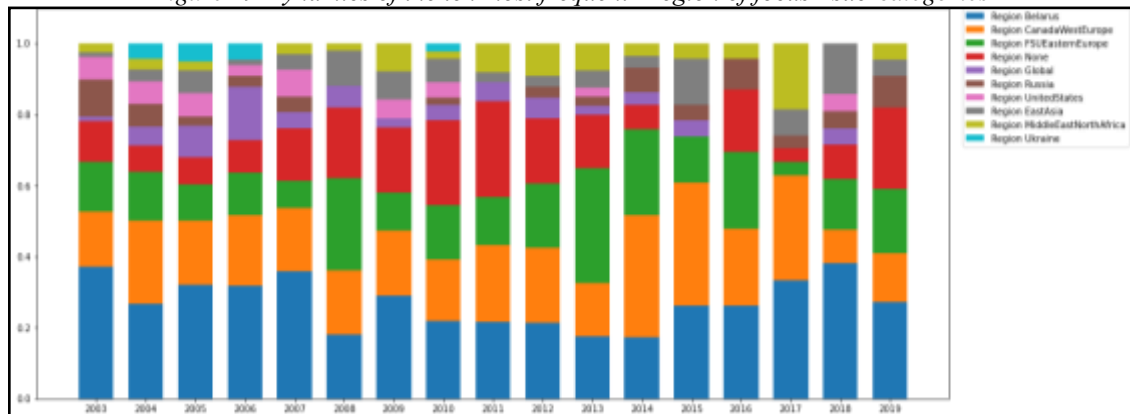
Figure 48 Dynamics of the ten most frequent “substantial focus” sub-categories



Following the structural logic of narration set in the subchapter on Ukraine, we conclude this subsection on thematic patterns in the Belarusian IR journal by looking at the dynamics of the region of focus category. No surprise that Belarus itself appears to be the primary “regional” focus of local authors; however, there are several quite peculiar trends as well. In particular, similar to Ukraine, Canada, and Western Europe, show a higher ratio than that of the FSU region.

Moreover, like Ukraine, Russia is ranked sixth regarding its regional focus share, which is quite surprising if one keeps in mind the political reality of Belarus, namely its highly close ties with the former. The percentage of the US is lower than its already small share in the Ukrainian case. On top of this, contrary to the latter case, it is not reinforced with occasional increases in “attention”; it remains steadily low. Put differently, Belarusian IR scholars are interested in their own country, Western Europe, and Canada regions on par with the FSU region and the one of a global kind. Its closest and largest geopolitical neighbor is of not much interest to them.

Figure 49 Dynamics of the ten most frequent “region of focus” sub-categories



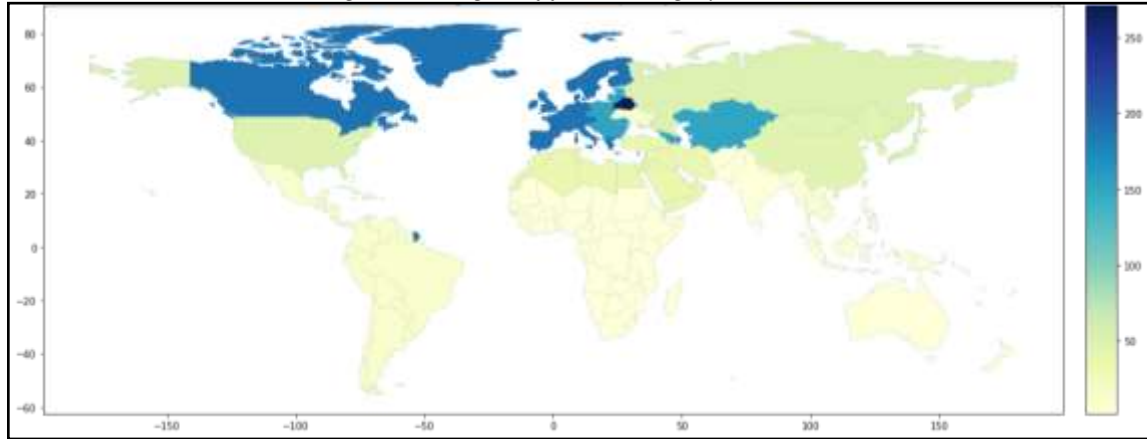
Thus, one might see that the Belarusian case, although with some peculiarities, confirms observations found in the analysis of the Ukrainian journal. Those are mostly connected to

<sup>822</sup> United Nations in Belarus, 2022; Check, 2021.

the lack of serious interest in its “immediate” neighbors and a clear preference for focusing on Western Europe and North Atlantic countries.

The following map better illustrates the abovementioned data geographically. In particular, it shows the level of interest regarding northern Africa and the Maghreb, similar to the Ukrainian case. Moreover, Russian enjoys the same degree of popularity as countries of the Middle East and China, while Kazakhstan is in line with the EU’s Eastern European members.

Figure 50 "Region of focus" category visualized



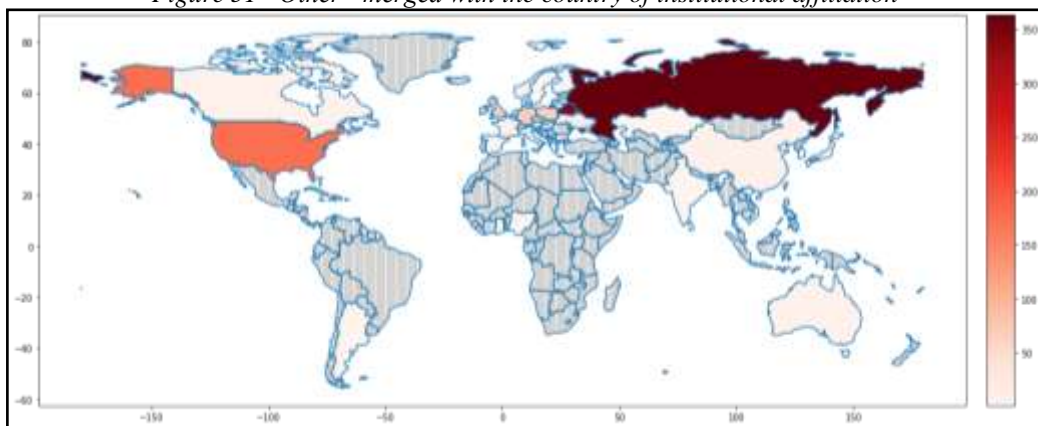
Now, after assessing the thematic patterns associated with articles published in BJILIR, we can move to the final stage of this subchapter, namely bringing together the two perspectives and expecting even more exciting observations to come about.

#### 4.3.4. Merging the two approaches

##### 4.3.4.1. Substantive focus six sub-categories and “reference country.”

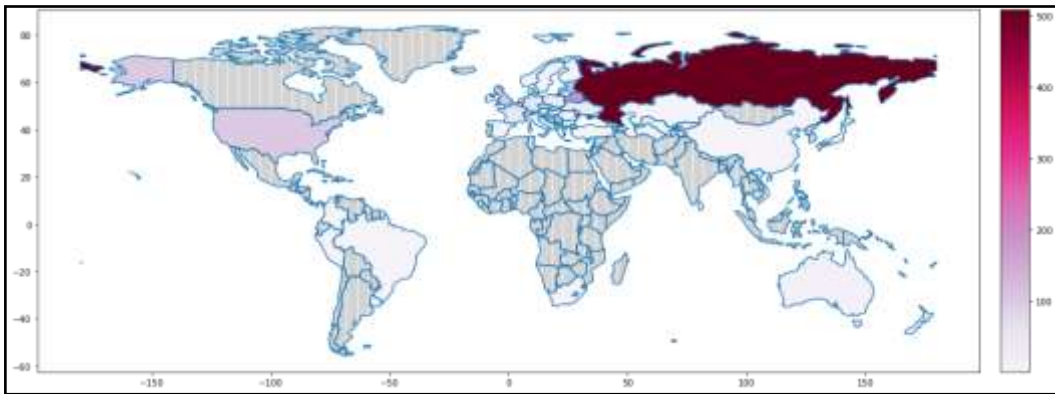
In this subsection, we follow the investigative logic already outlined within the sub-section on IR in Ukraine. Thus, we first examine the Other and International Law substantive focus sub-categories.

Figure 51 “Other” merged with the country of institutional affiliation



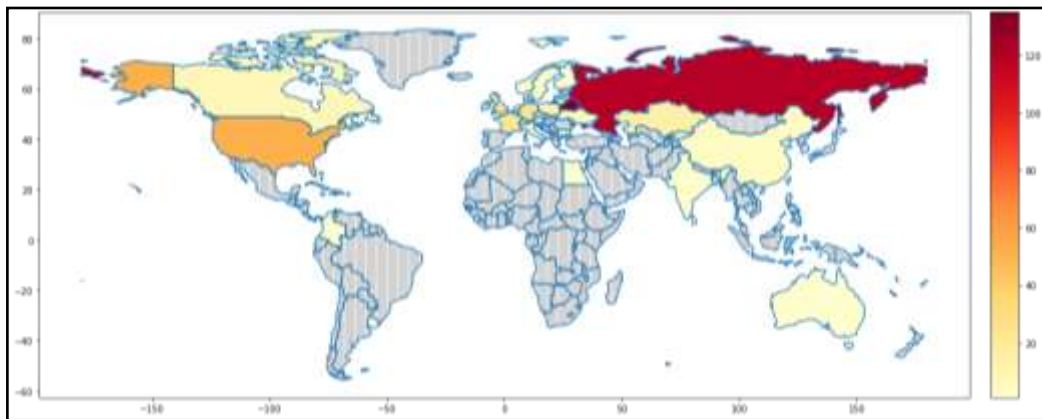
The former is typical for the Belarusian IR pattern, namely Russia, Belarus, the US, and Germany, with Poland and the UK. At the same time, the remaining share of country affiliations barely accounts for more than one-tenth of the references. Similar frequencies apply to the case of the International Law focus subcategory, with only two reservations: a higher level of diversity compared to the Other subcategory and Germany giving place to the UK. (Placeholder2)

Figure 52 “International Law” merged with the country of institutional affiliation



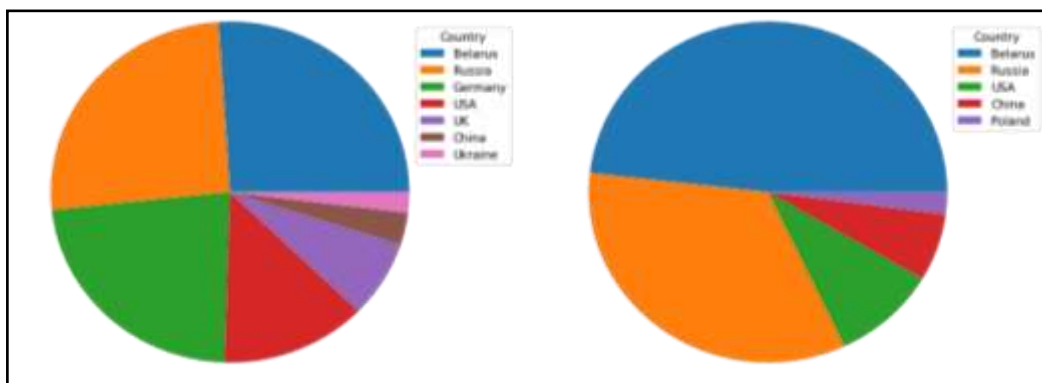
Here again, we might see the same pattern within a different thematic focus subcategory, IGO. The higher share of references to the Belarusian authors might be explained by the abovementioned fact of the thematic importance of this subject matter to the whole of Belarusian society, on par with the abovementioned activities of the UN Mission to Belarus.

Figure 53 IGO merged with the country of institutional affiliation



The subcategories of foreign policy and trade preserve the same dynamics, with Belarus being the most frequently referred to country (in terms of the sources’ authors’ country of institutional affiliation), followed by Russia, and then interchangeably by US or Germany. However, in the Trade subcategory, we see this trend being broken for the first time, with China occupying a small share of the ratio of references in terms of its value; nevertheless, in terms of ranking, occupying the place usually taken by Germany or UK.

Figure 54 Foreign Policy and Trade merged with the country

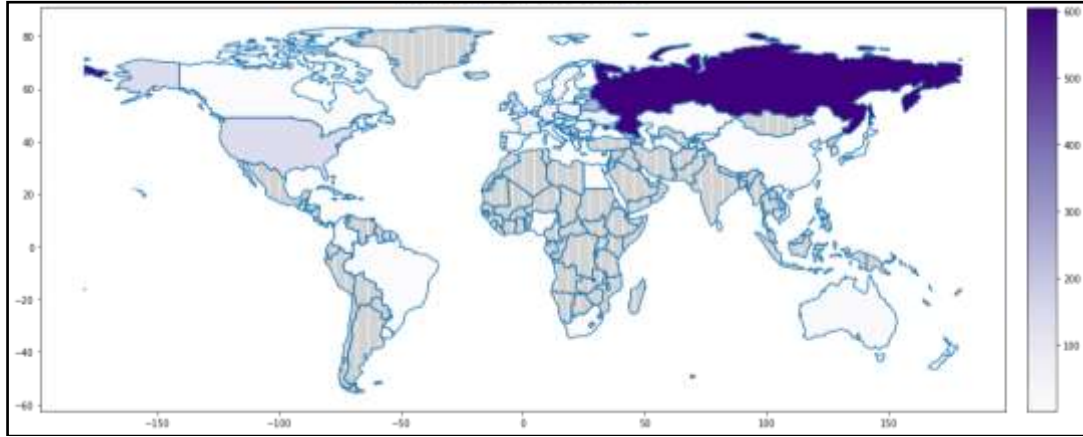




4.3.4.2. Issue area most popular subcategories and “reference country.”

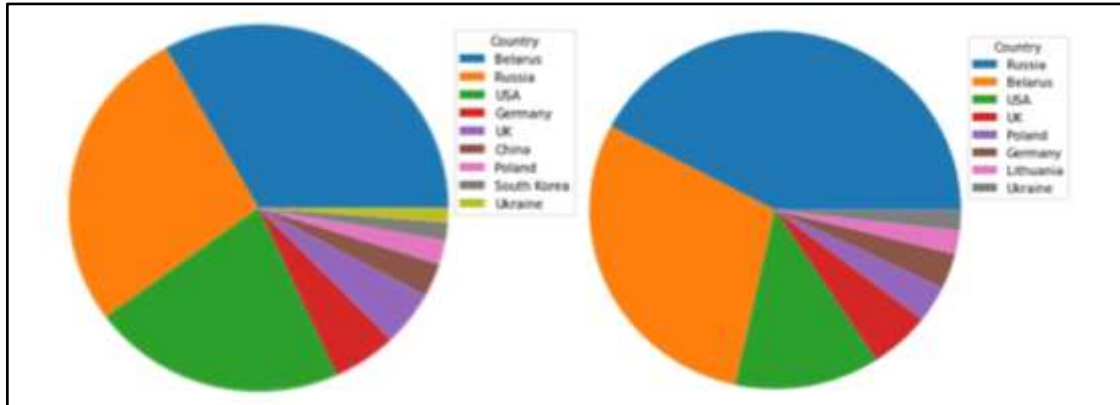
Judging by the fact that international law is the most frequent thematic subcategory, we can say that our previous assumption still holds as quite likely, since here, Russian sources occupy a most considerable portion of all of the references, with Belarusian IR scholars following them with a significantly lower share of references. All other countries, even if combined, barely account for the same number of references as those belonging to Russian authors.

Figure 55 International Law



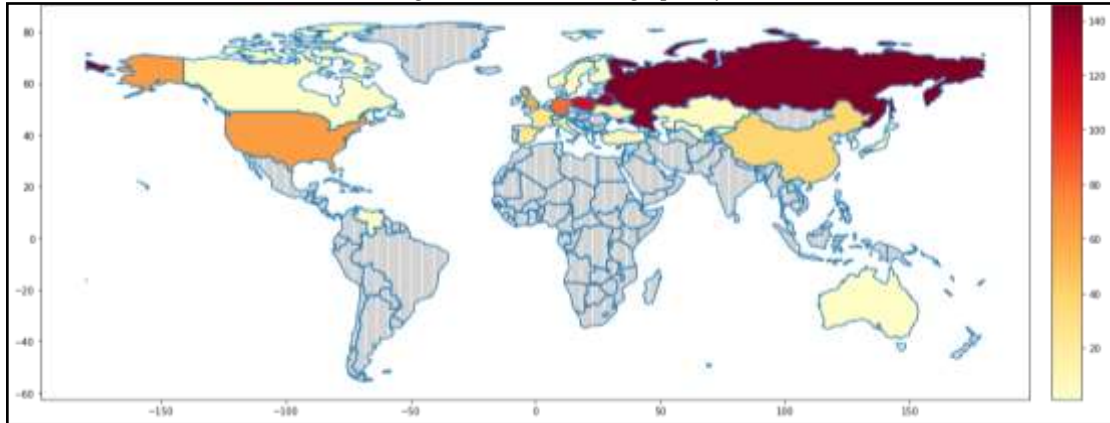
From this, one might conclude that when it goes to issues connected to international law, Belarusian IR scholars tend to rely on Russian authors. The pattern slightly changes when we switch to the IPE sub-category. Here, one can see that Russian and Belarus swap places, which account for more than half of all the references. Moreover, the diversity of authors' geographical belonging also decreases. Almost 90% of all references go to authors from four countries.

Figure 56 IPE and Other merged with the country of institutional affiliation



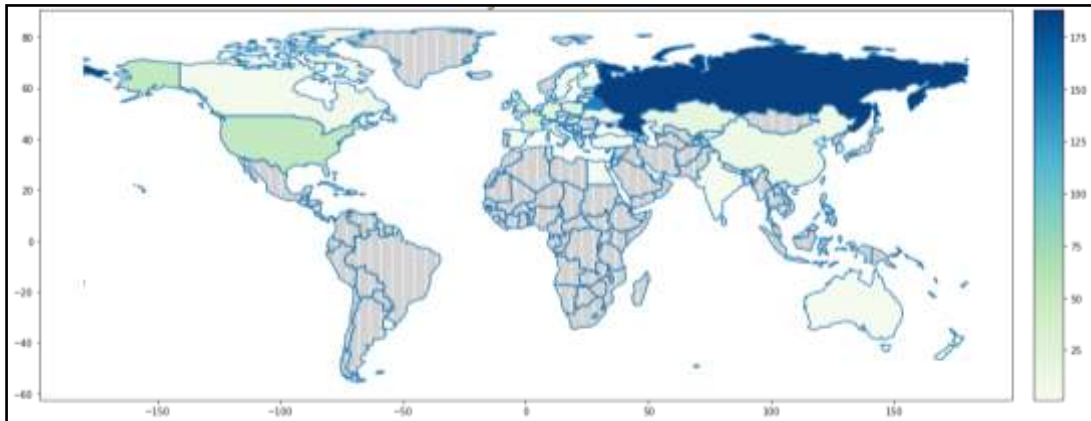
With the local foreign policy subcategory, we see the composition of the countries slightly changed, with Poland being the third one in terms of reference frequency, followed by Germany, a pattern quite different from the Ukrainian one with its complete absence of any immediate neighbors apart from Russia.

Figure 57 Local Foreign policy



And finally, we come to the last two issue area subcategories, namely the Other and International Organization. Here Russia holds a clear first place regarding its share of references, clearly outperforming the closest competitors, Belarus and US. The UK follows the latter two competing with Poland or Germany for fourth place. Concerning the International Organization subcategory, for the second time, we see Kazakhstan, the Netherlands, and even Italy hold a more or less statistically significant share of the references in the Belarusian journal. Moreover, for the second time, Kazakhstan has a comparable ratio of references to those of China, yet again lagging compared to Russia and the US. It is easily explained since, as in the case of local foreign policy, Kazakhstan appears to be among the “primary interest” countries, not only because of its relative geopolitical proximity but also due to the economic linkages between the two countries.<sup>823</sup>

Figure 58 International Organization



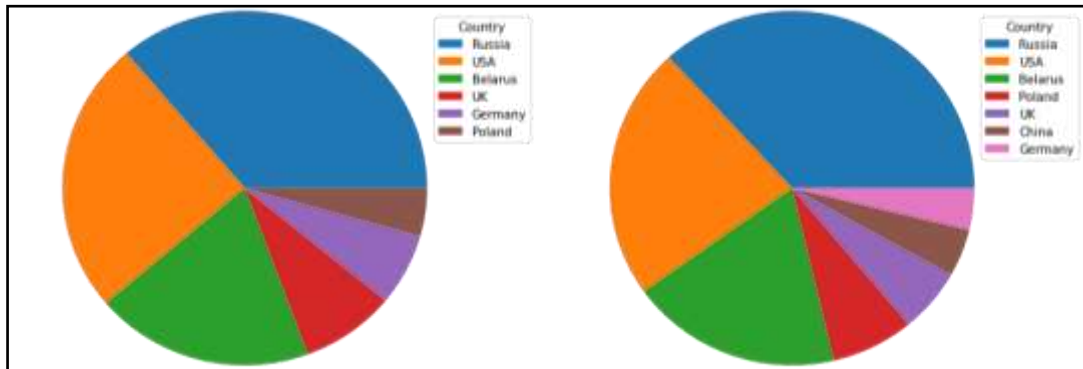
Overall, one can see that across most of the issue areas, the same pattern is preserved. Namely, the one where we have a substantial portion of references to the authors from Russia and Belarus, followed by a quarter of references belonging to authors from the US, UK, or Germany. At the same time, the remaining one-tenth of all references are made to an everchanging set of countries. Thus, we can conclude that although the US or general western disciplinary dominance is not observed within the local discipline, it is merely substituted or mediated by the Russian one.

<sup>823</sup> Tochitskaya, 2010; Yarashevich, 2014.

#### 4.3.4.3. Paradigmatic orientation and “reference country.”

Although most of the articles in the Belarusian Journal appear to be nonparadigmatic, we can still draw some conclusions from this analysis applied to the Belarusian case. In particular, one might see that the neo-neo nexus is mainly associated with Russia, not the United States IR community or any other Western community. It additionally confirms our assumptions regarding the role and position of the Russian IR community concerning the Belarusian one.

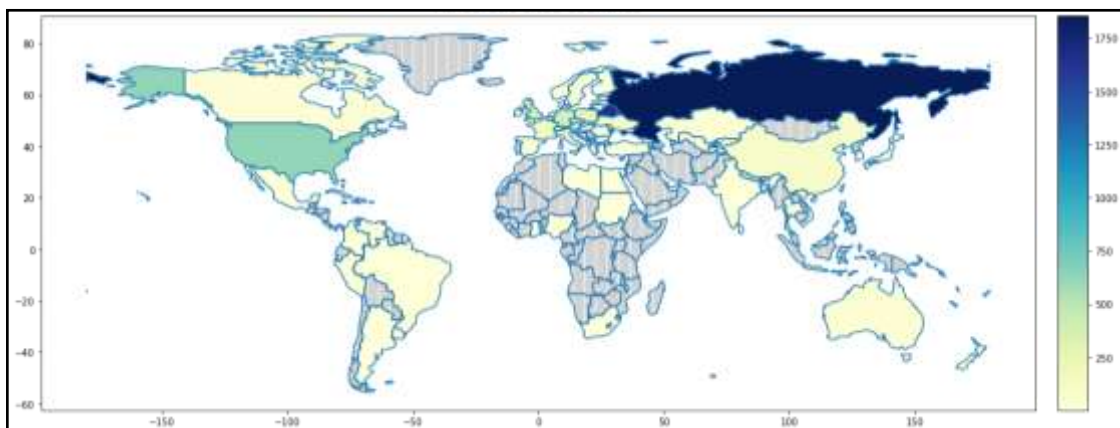
Figure 59 Liberal/Realist orientation merged with the country



Similar to those previous cases, one might see that the atheoretic orientation appears to be the most diverse concerning the geographical belonging of the authors. Moreover, the atheoretic orientation clearly shows how geographical diversity is rising, and the Global South’s involvement becomes more evident.

From this, we may conclude that apart from regional or issue focus, the paradigmatic framing might act as the instrument of disciplinary hegemony. In other words, it does not matter which theory or methodology one applies, but if any of them is involved. One might use critical post-colonial or queer theory in her analysis of the migration crisis and consider herself a non-mainstream IR scholar. However, from the very moment one steps on the ground of the theoretical disciplinary self-identification, she is confined by the limits and requirements of the latter framework.

Figure 60 Atheoretic orientation merged with the country



However, this is a weak assumption since, apart from the higher levels of geographical diversity in terms of the number of countries “involved,” the data shows typical levels of self-referentiality and inequality of distribution of references concerning several countries. The only difference from the global picture is that the place of a “hegemon,” usually held by the US or the US and Europe in tandem, is now occupied by Russia. It, in turn, is easily



adhered not only to the soviet disciplinary heritage but also to the specifics of scholarly interaction due to political factors. Among them, one might list the Lukashenko regime's aversion, on the official state level, to support closer and more intense contact between scholars from the EU and US and local ones.<sup>824</sup>

#### In conclusion

Overall, one can conclude that the above study of the published dimension of the two peripheral IR communities was satisfactory. In particular, several demographic specifics were identified concerning the respective communities. The Ukrainian IR can be described as characterized by several features. First among them is a pronounced gender inequality in terms of disproportionately prominent articles published by male scholars compared to their female colleagues. Second, the published dimension might be described as one of a metropolitan kind, with scholars from regional universities being misrepresented. Third, one might speak of low levels of disciplinary internationalization based on the number of articles published by foreign authors. Moreover, the insularity explanation might be of primary importance since we would have seen many IR scholars from the neighboring national IR communities if it were about the lack of prestige associated with local publishing. However, since this is not the case, we can speak of the insularity-like publishing patterns characteristic of the Ukrainian IR.

The Belarusian IR community, in turn, is characterized by a slightly different set of features. First is an apparent gender "neutrality" trend in the discipline, linked to an equal number of articles published by male scholars compared to their female colleagues. Second, the published dimension might be described as one of a metropolitan kind, with scholars from regional universities being misrepresented. Third, one might speak of low levels of disciplinary internationalization based on the number of articles published by authors not belonging to the local or national IR community. Moreover, like the Ukrainian case, the insularity explanation might be of primary importance since if it were just about the lack of prestige associated with local publishing, we would have seen many IR scholars from the neighboring national IR communities. However, since this is not the case, we can speak of the author profile features characteristic of the Ukrainian IR.

From the point of view of significant findings regarding the citation patterns and thematic content analysis, on par with the attempt to merge the two, the primary findings are as follows. First, although the predominance of the US, UK, and European IR scholars are visible, it does not account for the unmatched one. In particular, in the case of Ukraine, the discipline appears to be self-sufficient and self-referential, with local scholars mostly citing their local colleagues. However, the Western predominance becomes more apparent if one looks into the thematically adjusted distribution of geographical diversity of the cited authors. The data from the Ukrainian case showed that the mainstream theories usually associated with disciplinary dominance mostly connected to the local IR community. At the same time, those critical theories generally considered to signify the absence of dominance are mediated by the Western national IR communities. Similarly, the Ukrainian case gave an empirical hint on the validity of the conceptual assumption of the current work found in the third chapter, namely the increasing time lag between the citing and cited article if the latter's language is English. Unfortunately, the Belarusian case did not support it, yet neither did it contradict the findings from the Ukrainian case.

The Belarusian case, in turn, gave empirical proof that the notion of the disciplinary semi-periphery should be given further attention due to its role in explaining the channels and specifics of disciplinary dominance. In particular, the overwhelmingly pronounced reliance on Russian sources by Belarusian IR scholars speaks in favor of the

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<sup>824</sup> Ackermann, 2021; Humboldt Foundation, 2021.

abovementioned claim. Moreover, the more pronounced character of dependence on Russian sources concerning theoretical issue areas adds tremendously to the semi-periphery importance claim.

Overall, both cases empirically confirm two essential claims regarding disciplinary dominance and structures of scholarly communication. First is the finding by Kristensen regarding the heterogeneity of the core, or in other words, the issue of the core within the core. Ukrainian and Belarusian IR scholars cited predominantly those US IR scholars whose institutional affiliation overlaps with the Ivy League universities' geographical location. Moreover, on a large scale, both cases confirm the Global North orientation of the citation practices of the local scholars with the latitudinal character of the latter. Finally, the two empirical cases confirmed one of the assumptions found in the conceptual part of the work, namely the one regarding the paradigmatic and trans-communal channels of disciplinary dominance and inequality. While overall, the citation patterns in the two cases did not show any deviation from the conventional picture of the peripheral scholarship, the analysis of the merged perspective delivered two critical findings. First, the highest geographical disproportion of citing is found in various issues and focus areas, thus pointing to the trans-communal way of thinking about disciplinary dominance. Second, the highest levels of geographical diversity were found in articles categorized as atheoretical, thus indicating the dominant character of any paradigmatic framing.

## **In place of a general conclusion**

As stated at the beginning, this work has two primary goals as its research rationale. The first was conceptual and concerned with problematizing the conventional narrative about hegemony within disciplinary sociology. Since much of this narrative is based on references to the subfield's parental discipline and non-IR perspectives, such as the Gramscian one, an extensive conceptual case study was undertaken. The work analyzed and traced conceptual oscillations of hegemony in various intellectual contexts ranging from the Russian revolutionary thought to the one of post-structuralist analysis. As a result, several critical observations and conclusions were put forward. The latter finding was a starting point for reapproaching disciplinary sociology's conceptualization of hegemony. A critical rereading was presented. The primary preparatory element of this rereading was the location of the roots of conceptual misreadings and misinterpretations. Those were associated with the issue of double self-referentiality and Holsti's curse.

Subsequently, as a result of this rereading and based on the above-mentioned conceptual analysis of hegemony's usage in other intellectual domains, several hegemonic analogies were put forward. The most promising of those were associated with the neo-liberal perspective and its emphasis on the issue-area character of dominance, leading this work to the notion of disciplinary issue-areas and a corresponding domain-specific dominance, as well the realist inspired idea of the disciplinary public goods provided by a disciplinary hegemon. Moreover, the analogies derived from the ES, WST, and post-structuralist reading of hegemony are of a similar promising character. In particular, it goes about the emulation without recognition, disciplinary state-society theses, and the idea of discursive hegemony.

The conceptual part of the work was followed by an empirical investigation of the publishing pattern in two peripheral IR communities of Ukraine and Belarus. The problematic character of the aggregate view on disciplinary dominance received exploratory empiric confirmation. This confirmation was generated along both thematic and citation patterns dimensions. Similarly, the gender gap thesis was problematized with the data showing the peripheral case-specific variations concerning the gender composition of the profession. In addition, the regional hegemon thesis/disciplinary semi-periphery thesis received positive confirmation from the data regarding the Russian disciplinary presence in the national IR communities of Belarus and Ukraine. Likewise, the regional character of IR in CEE was empirically questioned by showing that neither in terms of geographic participation, references distribution, or thematic proximity it makes to speak of the CEE's IR. Finally, the issue-area analogy was preliminarily tested by applying the methodological merge of the thematic content analysis and the references analysis.

Yet, all of these are more of a general conclusion with no particular linkage to the structure of this work and no specific association with any of the respective chapters of this work. What follows, then, is the structure-oriented conclusion for this work coupled with the structurally oriented narration of the investigatory process.

Thus, the **first chapter**, with its emphasis on the Gramscian and non-IR usage of hegemony, allowed this work to confirm its initial assumption regarding the "mainstreamization" and "vulgarization" of the Gramscian and post-Gramscian hegemony within the subfield of disciplinary sociology. In particular, its attack on the "consent thesis" illustrated that neither the Russian Revolutionaries nor the British post-structuralists conceived of hegemony in terms of mere "consent." The case of the Russian Bolsheviks allowed us to see how hegemony is about the societal context, political disposition, and, even more importantly, one's strategy, goals, intentions, and aspirations. In this sense, Lenin's transfer of hegemony from the realm of individual autonomy to the one of the

society-wide pursuit of power is paramount. Hence, speaking of a less powerful but energetic minority aiming for political power, which acts not out of instinct or lust for power, but out of the conscious understanding of the societal process, leads us to the primary element of hegemony, namely projecting one's political aspirations and the vision of the future social order.

The analysis of Antonio Gramsci's usage of hegemony, in turn, allowed this work to problematize further the conventional narrative regarding hegemony and its consensual and non-material character. Moreover, a complex conceptual status of hegemony was confirmed, ranging from a mechanism of power, and its type to the very notion of order. Finally, the rereading of Gramsci allowed this work to solidify several conceptual observations further. First, it concerns hegemony's conceptual shift away from the attributive type of power. Instead, it becomes an emergent socio-political order with no fixed class association. Second, its dualistic character was confirmed, namely that of the dialectical unity of consent and coercion as the basis of the order's stability. Third, and this point stems from the abovementioned one, it concerns hegemony's foundation in the "preclusion" of one's ability to comprehend the social reality around herself. The latter issue points to the semantic-discursive component of hegemony instead of mere ideological indoctrination.

Approaching the WST's conceptualization of hegemony allowed us to see how hegemony can be "internationalized," i.e., transferred to the global scale without risking the fallacy of excessive structuralism. In particular, it showed us how hegemony might be conceived as embedded in the international economic domain while preserving its domestic roots, thus hinting at its multidimensional and multilevel character. Moreover, the former shifted the typical source of hegemony from the state to one of the social groups that interact within the transnational dimension, making hegemony a transnational phenomenon guided not by the logic of material power accumulation but the twofold one of capitalist accumulation and territorial expansion. This twofold character of the latter provides a rationale for explaining the consensual element of hegemony with the outcomes of conflicts between the abovementioned logics.

Post-structuralism, as represented by Laclau and Mouffe, emphasized the linguistic element of hegemony, already present in Gramsci and quite often overlooked. In particular, they showed how hegemony, as a fundamental organizing principle of social and political life, is not about making us express consent concerning something specific but rather how much it is about the actual absence of anything to agree on. In other words, hegemony is about meaning production, a kind of discursive power, but not the one associated with particular meanings. Instead, it is based on masking the difference under unity.

The **second chapter** brought us to the more familiar lands of IR theory. As mentioned at the beginning of this work, its primary goal was to problematize the disciplinary myth about the "realist vs. neo-Gramscian" hegemony" with the underlying opposition of material and immaterial factors, consent, and coercion. This goal was achieved successfully.

In particular, the very idea of the realist "attributive-materialist" conception of hegemony was destabilized. The only instance of such a realist conceptualization of hegemony pertains to the structural realism of Mearsheimer, Betts, and Schweller. Neither the classical realism represented by E.H. Carr and Morgenthau nor the later structural or HST versions subscribed to this view of hegemony. In particular, the latter conceived of a problematic character of such a conceptualization of hegemony, thus attempting to put forward more nuanced theorizations of hegemony. Another issue is whether it was done through the patch of political leadership, international public goods, or hegemonic rise and decline assumption. What is clear concerning the realist conceptualizations is that

hegemony was never just about material predominance. In other words, it might be seen as resting on the material power possessed by the state. Yet, the very power disparity in the question changes the international political dynamics, moving one's analysis into the immaterial factors realm.

Similarly, the neoliberal view on hegemony provided an additional confirmatory element for this work's destabilization task, yet in a slightly different manner. Apart from shifting the semantic focus from the power predominance itself to one of its constitutive effects, i.e., emergent institutional structures and patterns of cooperation (international regimes), it makes a step towards the processual side of the hegemony condition interactions, mainly in the form of the idea of the hegemonic socialization. Moreover, the conventional proximity of the Gramscian hegemony and Nye's soft power was effectively problematized and substantially criticized. In general, one might say that this work owes the neoliberal perspective several analytical conclusions concerning the case of hegemony. First, it pointed to the fact that although material predominance is necessary for any hegemonic order to be in place, it is not easily transformed and rechanneled across the various international domains. Second, it highlighted that in between the conventional conceptual couples of power base and power types in their material and non-material emanations, usually associated with dominance and hegemony, one could find an additional element, which might be labeled as power mode or power behavior. Finally, neo-liberals also paid attention to the ideational dimension of dominance, neglected mainly by the structural realists and non-clearly elaborated by those of the classical kind.

Subsequently, a closer look at the English school with its *via media* approach allowed this work to put even stronger emphasis, compared to the neo-liberal perspective, on the interactive, i.e., the social dimension of hegemony. Hedley Bull's idea of recognition as a corollary for a primary element of hegemony advanced this work's general purpose immensely. In particular, it allowed the understanding of hegemony as a three-fold phenomenon, namely that arising from a set of temporally stable interactions, normalization of power inequality in the international system, and mutual recognition of rights and obligations stemming from the latter imbalance. In other words, ES conceives of hegemony as arising from the power predominance, i.e., power inequality; however, the very same inequality acquires a specific relational flavor, namely that it appears to be a framework of recognized roles and statuses seen by those who participate in this unequal relation. With time, it loses its initial root in power inequality and appears to be normative, not about any of the features of the actors possessing specific status roles.

Although with case-specific oscillations of meaning and semantic emphasis, a similar logic is characteristic of the whole body of ES theory. Interestingly, despite hegemony's essential opposition to the idea of the international society, it turned out that a small step was needed to overcome this opposition and make hegemony a constitutive factor in the international society formation process. Ian Clark's view of hegemony clearly illustrated the latter point by conceptualizing the latter as an international institution.

The neo-Gramscian perspective, in turn, allowed us to shift away from a state-centric standpoint while simultaneously decreasing the prominence of material factors while speaking of hegemony even further. First, it allowed this work to talk of hegemony as a societal phenomenon acquiring its international dimension only due to its origins in a specific domestic social formation. Second, it emphasized the processual side of hegemony in two respects. We speak of the global extension of the abovementioned domestic transformation and the following transformation into the global order exceeding even the very notion of international. Third, it moved this work from the state-centric view of hegemony to the one focused on social forces and social groups, making hegemony a structural expression of their activities, thus switching this work's perspective on

hegemony to the transnational one. And finally, it allowed the current work to quit speaking of hegemony as a monolithic phenomenon in several respects, namely that the dominant state, group, and class appear to be composed of various conflicting fractions and that the hegemonic order is not characterized by structural and substantial homogeneity since the differential levels of social economic and political processes across this order presuppose a high level of individual variability among the participants of this order, whether conceived in terms of their geographical and nation-state origin or combined with those of social status and civilizational perspectives. Moreover, it equipped this work with the notion of the hegemonic agents in the form of Gramscian intellectuals operating within and with the help of the global civil society, thus moving even further away from a mere structural and automatic logic of power predominance.

The **third chapter** structurally and substantially finalized the conceptual analysis put forward as one of the primary tasks of this work. In particular, it advanced two explanatory theses concerning the abovementioned conceptual misreadings of disciplinary hegemony in the sociology of IR, namely Holsti's curse and double self-referentiality theses. The former pointed to a conventional misreading of Kalevi Holsti's *The Dividing Discipline*, leading to the subsequent conceptual mistake while dealing with hegemony. The latter, in turn, added an explanation for the conceptual problems associated with hegemony and the sociology of IR. Specifically, it concerned that IR scholars in general, and those doing sociology of IR in particular, approach their discipline in the same manner as they approach the object of this discipline, namely the international. In other words, they use the terms and heuristic logic associated with studying international relations to study their field and treat the latter as international.

In addition, two conceptual cases involving the two latter fallacies of thinking about disciplinary hegemony were analyzed. The first, associated with the work of Wiebke Wemheuer-Vogelaar, was used to exemplify the consequences of simplistic structural thinking about the disciplinary hegemony, which, when deprived of solid conceptual work, leads to the empirical results which barely add to our understanding of the disciplinary dominance. The second case, Helen Turton's work, exemplified how an inattentive and non-critical conceptual transfer leads to paradoxical empirical results and conclusions. In particular, specific attention was paid to her mainstreamization of the Gramscian hegemony, which ultimately led her to the neo-realist way of thinking about disciplinary dominance, with the only difference being the introduction of the ideational dimension into the conceptual equation.

After finalizing the abovementioned conceptual case studies, this third chapter came to its structural and substantial apex: the part on *hegemonic analogies*. Five elaborations on the possible conceptualizations of disciplinary hegemony were put forward. Each resulted from the adaptation and conceptual transfer of the theoretical perspectives considered earlier in this work. The first dealt with the Gramscian analogy and, by extension, the neo-Gramscian one. It proposed the idea of the disciplinary state-civil society complex, each element defined by specific functional and organizational characteristics. The latter ranged from the character of norms and hierarchies IR scholars have to follow to those related to disciplinary knowledge production. Moreover, the idea of the disciplinary intellectuals, the historic block, was elaborated, with the former ascribed the situational-functional role rather than a pre-ascribed attributive one. Finally, the idea of disciplinary consent was elaborated, with its critical elements of passive consent and contradictory disciplinary common sense.

The post-structuralist analogy for disciplinary dominance deal more with the issue of discursive power and the substantial content of the disciplinary discourse. In this sense, the disciplinary hegemony was equalized with one's ability to create chains of semantic

equivalences among neutral and contradictory statements. This ability was primarily linked to the notion of the disciplinary empty signifier and its crucial role in disciplinary hegemonization. In addition, the WST analogy for disciplinary sociology was presented. Its primary focus revolved around the disciplinary development lag, as well the modes of disciplinary production. Similar to the case of the Gramscian analogy, the transnational and heterogenous character of disciplinary hegemony was highlighted.

The conclusive set of analogies dealt with those derived from the corpus of IR theories. In particular, the realist analogy led to a peculiar assumption regarding the stability provider role of the disciplinary hegemony and the basis of the latter in one's ability to provide disciplinary public goods. The latter range from the maintenance of international publishing outlets to ensuring the existence of a common disciplinary language. Moreover, the very critical idea regarding the periphery's role as a data provider, not capable of theory development, was reformulated as the hegemonic burden thesis, namely that the periphery is akin to the free-rider who can enjoy all the fruits of the core theory without investing in it any of its resources. Moreover, the introduction of the disciplinary orthodoxy was conceptualized as a form of disciplinary public good aimed at maintaining international disciplinary stability.

The *neoliberal hegemonic* analogy allowed for the following reconceptualization of disciplinary hegemony. In this reconceptualization, disciplinary hegemony is seen as a primary position within the network of disciplinary co-dependencies with other IR communities or groups of IR scholars. In other words, one might speak of one's relative position in the web of the disciplinary public goods provision, namely what kind and quantity of those "goods" an IR community can "produce" and "supply" on par with the "demand" for those from other IR communities; its position within the "issue-specific" international disciplinary regimes understood in terms both its ability to preside over a framework of disciplinary costs and benefits distribution and establish rules and norms governing respective disciplinary issue areas; and the exclusive character of the public disciplinary good provided by the former IR community. Moreover, following Keohane, the idea of international disciplinary regimes was further elaborated as composed of disciplinary principles, norms, rules, and procedures. Those three elements revolve around a specific international issue area, thus making it neatly correspond with the thematic, disciplinary divisions according to substantive focus or issue areas. In such a way, we speak about the international disciplinary regime as identical to its thematic sub-fields, such as IPE, foreign-policy analysis, or even international political theory. The abovementioned elements fit this conceptualization quite neatly as well.

The *ES analogy*, in turn, brought in two additional elements concerning disciplinary hegemony. First, it problematized the conventional notion of disciplinary consent even further, conceptualization as scholarly emulation. The latter was reconceptualized to include various types of consent depending on the context, reasons, and outcomes of the scholarly emulation. In this sense, disciplinary hegemony was associated with emulation with recognition. The latter implies conscious emulatory practices due to the acknowledgment of the substantial development and quality gaps between the peripheral and core scholarship. At the same time, it was opposed to the notion of emulation with recognition, which, in fact, better suits the conventional definition of disciplinary coercion, thus pointing one more time at the problematic character of the existing conceptualizations of disciplinary hegemony.

The **fourth chapter**, in turn, brought forward the results of the empirical study about the publishing patterns in Ukraine and Belarus. Its results pertain simultaneously to the general sociology of IR realm, that of the regional CEE discipline literature, and the hegemonic analogies formulated in this work. In particular, several demographic specifics

were identified concerning the respective communities. The Ukrainian IR was described as characterized by several features. First among them was a pronounced gender inequality in terms of disproportionately prominent articles published by male scholars compared to their female colleagues. Second, the published dimension was described as one of a metropolitan kind, with scholars from regional universities being misrepresented. Third, one could speak of low levels of disciplinary internationalization based on the number of articles published by foreign authors. Moreover, the insularity explanation might be of primary importance since we would have seen many IR scholars from the neighboring national IR communities if it were about the lack of prestige associated with local publishing. However, since this is not the case, we can speak of the insularity-like publishing patterns characteristic of the Ukrainian IR.

The Belarusian IR community, in turn, was characterized by a slightly different set of features. First was an apparent gender “neutrality” trend in the discipline, linked to an equal number of articles published by male scholars compared to their female colleagues. Second, the published dimension might be described as one of a metropolitan kind, with scholars from regional universities being misrepresented. Third, one could speak of low levels of disciplinary internationalization based on the number of articles published by authors not belonging to the local or national IR community. Moreover, like the Ukrainian case, the insularity explanation could be of primary importance since if it were just about the lack of prestige associated with local publishing, we would have seen many IR scholars from the neighboring national IR communities. However, since this is not the case, we can speak of the author profile features characteristic of the Ukrainian IR.

From the point of view of significant findings regarding the citation patterns and thematic content analysis, on par with the attempt to merge the two, the primary findings are as follows. First, although the predominance of the US, UK, and European IR scholars are visible, it does not account for the unmatched one. In particular, in the case of Ukraine, the discipline appears to be self-sufficient and self-referential, with local scholars mostly citing their local colleagues. However, the Western predominance becomes more apparent if one looks into the thematically adjusted distribution of geographical diversity of the cited authors. The data from the Ukrainian case showed that the mainstream theories usually associated with disciplinary dominance mostly connected to the local IR community. At the same time, those critical theories generally considered to signify the absence of dominance are mediated by the Western national IR communities. Similarly, the Ukrainian case gave an empirical hint on the validity of the conceptual assumption of the current work found in the third chapter, namely the increasing time lag between the citing and cited article if the latter’s language is English. Unfortunately, the Belarusian case did not support it, yet neither did it contradict the findings from the Ukrainian case.

The Belarusian case, in turn, gave empirical proof that the notion of the disciplinary semi-periphery should be given further attention due to its role in explaining the channels and specifics of disciplinary dominance. In particular, the overwhelmingly pronounced reliance on Russian sources by Belarusian IR scholars speaks in favor of the abovementioned claim. Moreover, the more pronounced character of dependence on Russian sources concerning theoretical issue areas adds tremendously to the semi-periphery importance claim.

Overall, both cases empirically confirm two essential claims regarding disciplinary dominance and structures of scholarly communication. First is the finding by Kristensen regarding the heterogeneity of the core, or in other words, the issue of the core within the core. Ukrainian and Belarusian IR scholars cited predominantly those US IR scholars whose institutional affiliation overlaps with the Ivy League universities' geographical location. Moreover, on a large scale, both cases confirm the Global North orientation of the



citation practices of the local scholars with the latitudinal character of the latter. Finally, the two empirical cases confirmed one of the assumptions found in the conceptual part of the work, namely the one regarding the paradigmatic and trans-communal channels of disciplinary dominance and inequality. While overall, the citation patterns in the two cases did not show any deviation from the conventional picture of the peripheral scholarship, the analysis of the merged perspective delivered two critical findings. First, the highest geographical disproportion of citing is found in various issues and focus areas, thus pointing to the trans-communal way of thinking about disciplinary dominance. Second, the highest levels of geographical diversity were found in articles categorized as atheoretical, thus indicating the dominant character of any paradigmatic framing.

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