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VALUES, NORMS AND SOCIAL DYNAMICS

ABSTRACT
The aim of this paper is to offer a distinct approach to the theoretical conceptualization of values and norms, as well as their relationship to one another. This approach views values as a factor that can hinder the integration of the existing order and potentially contribute to a crisis of its reproduction. The relationship between values and norms is defined as potentially asymmetrical. The concept of normative-value dissonance is derived from this asymmetry, indicating the dynamic character of relations between changes to the dominant system of social reproduction and changes to the order of values and norms. Normative-value dissonance can further be broken down into systemic normative-value dissonance, which occurs when the value and normative order are not harmonized due to changes of the system of social relations as a whole, and intrasystemic, which occurs due to changes in the dominant social order, without changes to the foundations on which it is based.

KEYWORDS
values, norms, normative-value dissonance, dominant and alternative values, central and peripheral values and norms.

Introduction

Building on the existing literature on values, the primary aim of this paper is to provide a new perspective on the role of values in society, specifically on the interplay of values and norms and the interplay's possible outcomes for the process of social integration. While some of the most influential theoretical approaches in this area have focused on the issue of social system integration and the question of how values contribute to this integration (for example, Parsons & Shils 1962), this approach seeks to move in the opposite direction primarily by striving to show how values can hinder integration and lead to crises of reproduction of existing dominant social relations or otherwise contribute to such crises. Further, while contemporary, mostly socio-psychological or psychological approaches typically rest on nominalist foundations and therefore necessarily develop concepts on the basis of assumed characteristics of 'human nature' (as is the case with Inglehart's materialist and postmaterialist

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values, based on human needs as defined by Maslow[1], or Schwartz's ten basic value-types[2]), we analyze values as primarily founded on the dominant social system. We will show that this system represents the framework in which values are first formed and changed before they themselves contribute to the shaping and changing (or stagnation) of the system.

In mainstream approaches values appear principally as reflections of economic, political and cultural processes (dominant social relations, advancing processes of modernization and similar; for examples, see Lipset 1965, Almond & Verba 1980, Parsons 2005, Hofstede et al. 2020, Inglehart & Baker 2000, Inglehart & Welzel 2005, Welzel & Inglehart 2010); alternately, within contemporary dominant nominalist theoretical perspectives, they are patterns of socially desirable thoughts or actions adopted by individuals or groups (Inglehart 1997, Chong 2000, Schwartz 2012). Our analysis will, in contrast, center on values as historically dynamic phenomena.

Initial Conceptual Definitions

Irrespective of significant differences in the interpretation of this phenomenon, typical approaches in sociological analysis of values share a joint – and for the social relations within which they are analyzed, 'positive' – socially integrative aspect as a starting point: the role values play in sustaining a given social order. This applies to Weber's (1978) understanding of the role of values in legitimizing those in power and the order as a whole, as much as for a whole slew of analyses derived from it (for example, from Parsons and other functionalist sociologists to contemporary thinkers such as Inglehart). Situated within the same framework, and related to the concept of values, is Marx's (1977) understanding of the role of ideology in sustaining existing systems of social domination, as is, following in these footsteps, Gramsci's (1978) position on cultural hegemony as one of the pillars of the ruling order.[3]

The first approach rests on the assumption of a voluntary establishment of consensus on the acceptability or desirability of a given social order, which is formed, for example, on the basis of culturally defined choices under conditions of social competition. Meanwhile, the second approach starts with the hypothesis of a forced establishment of social consent, on the basis of normatively regulated physical coercion by the repressive apparatus of the state, as well as the 'invisible' imposition of the prevailing worldview through processes of socialization – within the family, education system, ecclesiastical institutions

1 Inglehart (1997), Inglehart & Welzel (2010). For a more detailed critique of Inglehart's approach, see: Haller (2002).

2 Schwartz (1994, 2006, 2012). Also, it is certainly worth mentioning the recent texts by Martin & Lembo (2020) and Miles (2015), although we will not deal in detail with the views that are typical of the socio-psychological approach.

3 For more on approaches to and definitions of values in the social sciences, as well as research practices prior to the 1980s, together with extensive bibliographical data, see: Spates (1983). For new approaches and research, see: Thome (2015) or Chong (2000).

and the hegemony of informational systems and similar. Nevertheless, in both approaches the emphasis is on the assumption that the value system stabilizes the given order and, by presenting them as universally desirable, dictates the socially acceptable forms of thought and action. In both variants of this general framework, viewed from our perspective, the analysis of values emerges as an approach that is restricted to the framework of 'social statics': values represent an element that, by ensuring social integration within the framework of given social relations, facilitates stable reproduction and, ultimately, the stability or immutability of the dominant social order.

In contrast, the approach developed in this paper shifts the debate to a different plane, to issues primarily pertaining to 'social dynamics'. By which we mean social processes that emerge in circumstances where the values accepted by a large number of individuals – or, more importantly, social groups – undermine/impede the existing order or, on the other hand, hinder a new order establishing itself or taking root, by destabilizing the emergent dominant social relations. The starting point of this approach is, therefore, an understanding of historicity, in the sense of the longevity, instability and mutability (including dissolution), of every form of the production of social life. Of course, the alterability of the system of values is derived from the mutability of the means of social production, tied in with the current, preceding or potential/emergent system of social relations. In other words, our approach challenges those viewpoints that assume that the "normal" functioning of the social order is determined by the harmony between the conditions of reproduction of the system and its legitimation (whether this harmony is achieved through non-repressive or repressive means); on the contrary, we argue that the reproduction of the order constantly encounters various obstacles, resulting in the lack of complete alignment between the conditions of reproduction and the legitimation framework.

Studying the interaction between values, norms and social dynamics can involve different levels of analysis. The first level is trans-historical or trans-systemic, and refers to the conditions necessary for the reproduction of any system; the second level is systemic, it specifies conditions of social dynamics, i.e., systemic changes; finally, at the third level, the analysis incorporates the actor dimension, i.e., the way in which values are translated into concrete guidelines for the behavior of individuals and social groups.

At the highest analytical level, values can be understood as ideals, in Durkheim's sense, as set or a system of ideas (Durkheim 2010: 47, Peristiany 2010: xxi) or transfigurations that go beyond the reality to which they relate, that is, as a kind of "enriched reality" that does not refer solely to factual or possible state, but involves the idea of what is derisible (Durkheim 2010: 50, Karsenti 2012: 34). However, unlike Durkheim, in our understanding, they are not collective forces that have their own existence (Durkheim 2010: 49), independent from the underlying structures (Bottomore 1981: 909). On the contrary, we understand values as derived from material reality, that is, from the structures that form basic social relations. Bearing this in mind, it should be

noted that some of the fundamental values, which are necessary for the preservation of the social community, are usually formulated abstractly. In order to be able to regulate systems in which growing differentiation occurs, they contain a minimal reference to the concrete contents of social reality, they are more encompassing, referable to a whole range of different situations (Pusić 1977: 22–25). We refer to them as to trans-historical (or trans-systemic) values, since they transcend particular historical systems (Lazić & Pešić 2013, 2019; see also: Altiser 1971). The necessity of establishment of these fundamental, trans-historic values lays in the fact that the very notion of human social life ('ontologically') presupposes a certain relatively long-lasting regulation of interpersonal relations, which ensures the survival of a given community (for example, see: Feldman Hall et al. 2018). This regulation can take place in two ways: coercively (through imposed norms that include punishment of transgressions), and voluntarily (ensured in various ways through acceptance as desirable of encountered/created patterns of thought and action – i.e., values).

Analytically, we can distinguish trans-historic (or trans-systemic) from systemic values that emanate from the dominant system of social relations (Pešić 2017), although empirical demarcation is not always clear or possible, since the legitimation of historically specific orders is often sought to be expressed precisely through universal value patterns (Lazić & Pešić 2013, 2019). Given that ruling social relations are in principle conflicting, in this understanding of values they are closer to Gramsci's accounts of "organic ideology" (Gramsci 1978), a common world-view, established by the ruling classes, as emanations of their particular interests which legitimize the conditions of their own reproduction, being, at the same time, imposed (through coercion and consensus) as common and desirable. Within the mainstream functionalist approaches, understanding of the prime function of values is to achieve social integration (for example: Parsons & Shils 1962, Durkheim 2005). However, what is, as a rule, omitted from these analyses of values (with the exception of those rare cases that belong to conflict approaches) is that the primary origin of the need to achieve social integration, and the difficulties of its realization, lie in the fact that in most social orders, the fundamental social relations have been based on deep social division – i.e. on the inequitable distribution of economic, organizational and cultural resources (for example, see: Marx 1995, Weber 1964, Dahrendorf 1959, Lenski 1966, and Bourdieu 1986). These inequities lead to discordant interests of various social groups and, therefore, their lasting manifest and latent conflict.

In addition to this understanding of values at the higher analytical levels, as ideals, worldviews or ideologies that stem from the need to preserve social community as such or dominant system of social relations, at the lower analytical level, values appear as internalized aspects of individual or group consciousness that direct thoughts and actions. Therefore, values can further be specified as voluntarily accepted (according to the legitimizing mainstream approach) and/or – through various instruments of state coercion, socializing mechanisms, mass media and similar – imposed (according to the critical

approach) patterns of desirable thought and actions for individuals and social groups, which ensure social integration as a necessary precondition for the sustenance (reproduction) of the social order.[4] This definition neglects, at first glance, the most basic property of social life – its aforementioned historicity. Of course, on the other hand, by emphasizing how necessary it is for the sustenance of prevalent (conflicting) relations to voluntarily adopt/impose certain patterns of thought and action, this implicitly introduces assumptions about potentially destabilizing or, for the order itself, destructive tendencies within those relations.

When it comes to the notion of norms, here the definition also varies widely (see: Chong 2000 or Thome 2015), but commonly includes a stipulation indicating that punishment is the basis of social demands for compliance. Thus, again in the most general terms (so as to 'reconcile' differing approaches), *norms can be defined as prescribed patterns of behaviors (actions) that various social institutions impose on community members by providing for or imposing certain sanctions* (see, for example: Elder-Vass 2010). Of course, given the highly diverse sources of norms, the sanctions supporting them are also appropriately diversified (from judicial rulings, to ad hoc disapproval of certain actions, such as entry into a certain public space without a tie or, simply, public shaming).

The Interplay of Values and Norms

At this point the following question clearly arises: what is the key difference between norms and values and can this difference be reduced only to the existence and/or absence of sanctions? Indeed, it is not hard to see that this distinction gives rise to another – the existence of more or less formalized institutional 'support' for the normative system. Therefore, as we have seen and as is implied by the abovementioned differences, norms are in principle limited to regulating behavior, that is actions, since only actions can be formally sanctioned. Meanwhile, the scope of value regulation is somewhat broader and includes the views and beliefs of society's members. This further means that, in principle, the normative order acts explicitly and externally (most often through the existence of institutions that prescribe norms and sanction their violation). The value order, on the other hand, much more commonly appears implicitly and is 'internalized' (seemingly as the product of freely made decisions by individuals or groups). In order to provide a solid argument regarding separation between norms and values, we refer to Durkheim's distinction between formal (legal) norms and morality, which, although being a "species of single genus," differ on the basis of the sanctions that accompany them, organized in the first case and diffuse in the latter (Karsenti, 2012). In the case

4 Of course, it is clear that with this definition we want to include those values that refer to desired visions of social reality, leaving aside basic human values as defined by psychologists (Kluckhohn & Strodtback 1961, Rokeach 1979, Hofstede et al. 2010, Schwartz 2012).

of a violation of institutionalized norms, the sanction represents a reaction to the fact that the rule was violated (although the sanction itself does not say anything about the act itself), while in the case of morality, the idea of the sanction that represents the basis of the obligation to act in a certain way is combined with an internalized, socially conditioned, desire to act in that way (Durkheim 2010: 20–21).

Therefore, on the general (abstract) level, the two regulatory forms – values and norms – can engage in different relationships: the domains of social life that these forms cover largely, though not completely, overlap while the relationship between them is not completely symmetrical. In most cases, norms and values directly 'support' each other, in a manner that cuts both ways. The sacrosanct nature of private property, as a foundational value on which the social relations in capitalism, for example, are based, is supported by the normative order through legal penalties for theft and similar acts; but the same relationship can also be expressed in reverse: respect for norms is reinforced through the acceptance of corresponding values. Conversely, on the other hand, in certain circumstances, norms can stand in direct opposition to widely accepted values. Typical example here being the unsanctioned killing of indigenous people by the colonizers in the South America, implemented in contravention of the civilizational and, in the contemporary world, ubiquitous, universal value of the right to life. Additionally, norms can (in principle, only temporarily) be significantly out of step with values. So, the standardized plunder of the private property of an internationally and indeterminately defined 'enemy' can, in times of war or in various 'extraordinary' circumstances, remain unsanctioned. Furthermore, there are cases in which the relationship between values and norms is distant and indirect. Wanton squandering of one's own property is, for example, not penalized though it does go against certain widely held values, such as under Protestant asceticism during the initial period of accelerated accumulation of capital discussed by Weber (2010). However, deliberate destruction of one's own property can face sanction, for example, if a general social danger is attributed to it. Finally, some values, in various historical circumstances, can lie entirely beyond the normative framework. Such as, for example, those regulating emotional relations.

When it comes to the partial asymmetry of the relationship between norms and values, it should be emphasized that sustaining the normative order is made more difficult if it is not supported by corresponding values. Governing relations exclusively on the basis of coercion/penalization, without at least partially securing the support of widely accepted values, will inevitably lead to a crisis of the order. On the other hand, some values can persist for a very long time, whether for an individual or a group, even when they are not supported by the existing normative framework and can even stand in opposition to it (for example, patriarchal patterns of thought and behavior persist in many societies for decades after the introduction of legal norms that affirm gender equality).

There is no doubt, therefore, that consolidation of the principles on which the reproduction of a given social order (of fundamental social relations) rests,

inevitably implies the establishment of an appropriate normative order and imposes ever greater harmonization of norms and values. However, at the same time, it should be stressed that with the 'distancing' of some area of social life away from these fundamental relations (which define the order), the relationship between norms and values can become ever looser, to the point that parts of these two regulating forms can experience a high degree of separation/inconsistency.

The Social Order, Values and Norms: Dominant and Alternative, Central and Peripheral Value and Normative Systems

The historical character of social orders (systemic changes of social relations, as well as changes to intrasystemic relations) indicates that the introduction of additional distinctions to the analysis of values and norms is necessary. Specifically, a distinction must be introduced between dominant and alternative values, on the one hand, and between central and peripheral values, on the other – and this must also apply to the normative system.

Differentiating dominant and alternative values is founded on the fact that in every social order, in addition to the social groups that establish the relations that will define the order, there are also large social groups (social strata or classes) that are remnants of a preceding order, or groups capable of establishing a new order in the future, that enter into various relationships with the fundamental classes (or strata). In other words, a distinction must be made between dominant social relations, in which the relations that define the system are reproduced, and other relations that are in various ways connected to those dominant relations.[5] In a capitalist order, for example, the economic relations that sustain the primary role of the profit-orientated universalizing market economy – i.e., commodity production, pluralist political representation of the special interests of large social groups, the right to have these interests discursively presented in public, with the aim of mobilizing consent for the maintenance of the order (via the protection of the interests of privileged groups) – can be understood (in an ideal-typical formulation) as dominant social relations. Elements of other orders that differ (deviate) from these dominant relations to varying degrees can function alongside them, subordinated to them, in every social subsystem (in capitalism, for example, these might include limited slavery, autocratic political regimes, press censorship,

5 Of course, here we do not imply that all people necessarily accept values that are dominant within a specific system. Both at the systemic and at the individual level, values can, to a greater or lesser extent, be mutually inconsistent. This inconsistency, as we will show later, partially results from systemic and intra-systemic changes, which generate discrepancy between value and normative orders. In addition, dominant value system implies the parallel existence of one or more alternative value orders, which on an individual level leads to a whole series of possible outcomes, from complete conformity to dominant values, through partial acceptance, to complete rejection (see, for example: Merton 1938).

patriarchal patterns of thought and behavior, etc.). Within the framework of these relations, which can be defined as alternatives to the dominant relations, the corresponding values form and reproduce. Additionally, various values can survive long after a change to the fundamental social relations within which they formed. In other words, in addition to the dominant value system, a given social order will also contain elements of other value systems, which are historically shaped and have a tendency to be sustained by 'inertia'.

These factors – the historical, trans-systemic 'transfer' of values, the hybrid nature of every concrete historical social order (the presence of elements of other, earlier or alternative/potential orders), as well as the existence of social groups with different structural positions, interests and, subsequently, values – indicate that any analysis thereof must make a distinction between the dominant value system of a given order and its alternative value systems. Moreover, this distinction is relevant to analysis of values at the level of the social order but not of individual value orientations, the 'hierarchy' of which may indeed be reversed. The values that guide the thoughts and actions of individuals may be opposed to the dominant value system, where these individual deviations are always in the minority when compared with the typical patterns of thought and action in the given order.

On the other hand, it is clear that not all social relations on which a social order is founded, as is the dominant value order, are of equal importance for its reproduction. Therefore, the values that regulate reproduction of the fundamental characteristics of the order will be termed central values, while those that regulate the reproduction of less significant elements of the order will be termed peripheral (for example, patriarchal patterns, which are sustained within contemporary capitalism not only within the family environment but also in work environments).

A somewhat different situation is to be found when it comes to the normative order. Its regulatory role is founded on its binding (coercive, sanction-based) nature, hence elements of alternative normative orders cannot, in principle, be reproduced. This is not the case with inter-system regulation, where there is a distinction between norms that protect relations that are key to the reproduction of the order and those that regulate relations that are of lesser significance for its reproduction. Thus, in normative orders a distinction can be made only between the central and the peripheral. Central norms are the principles that are vital for the reproduction of dominant relations – these are, as a rule, regulated by formal and institutional sanctions (organized, legal, systemic, normative) and on which the central normative order is founded. Meanwhile, the series of norms that regulate relations (actions) that do not intrude upon dominant relations can be designated as the peripheral normative order.

Those norms, and also values, that ensure the survival of a given social order – by regulating desired patterns of thought and action in various of the order's subsystems and in alignment to the needs of its reproduction – demonstrate a tendency towards mutual consistency (although it may never be fully

achieved)[6]. It is precisely such harmonized values and norms, which 'cover' the entire functioning of a given order, that will be termed the dominant (and also central) value or normative system. In other words, at the most abstract analytical level, the dominant (and central) normative and value system, represents the totality of norms and values that ensure the unhindered self-reproduction of the order as a specific type of social relations.

Given the question at the root of this discussion – about the role of values in maintaining/undermining the existing, or consolidating the emerging/potential social order – it is clear that the key role in this social dynamic is played by the relationship between the norms and values that are established within dominant social relations. Therefore, further discussion will be limited to norms and values designated as the dominant and central normative and value system.

Finally, given their significance for sustaining/reproducing a social order, values and norms that are tied to the central field of social relations (the central normative and value system), as a rule, are imposed 'globally', primarily among the bearers of basic social relations, that is the larger social groups (classes or strata). As we move away from the central field, the imposition/acceptance of norms and values is increasingly ceded to narrower groups and individual actors. The mechanisms of global system regulation are structural: existing central norms and values are presented as a natural fact of life, in the same way as the ecological sphere (water, air, food and so forth). The unhindered reproduction of the order evidences that the large social groups view this as legitimate, in other words that they accept the central values, reducing the need for normative regulation and increasing value variations among narrower groups and individuals (which can create the illusion of greater individual freedom to accept various values). The spread of alternative values that call into question the existing order, and in so doing hinder or jeopardize its reproduction, results in the intensification of the mechanisms that impose central values, at first through the strengthening of the normative system that 'supports' the values in question, then through other mobilization and socialization mechanisms.

Of course, historically, the relationship between norms and values (both central and alternative and/or peripheral), and the forms of their 'overlap' and symmetry or asymmetry, is variable. It may be stated that the strengthening of a consensus on values (broader and deeper acceptance of dominant, central values) in a social community reduces the need for normative regulation (as in the case of Durkheim's concept of morality). Conversely, the spread of normative forms of regulation into areas where a value consensus previously prevailed, indicates difficulties in reproducing social relations, which is manifested through a decline in the acceptance of certain values. As an example of

6 Here, we should note that tendency towards establishing consistency between values and norms is necessary in order for the system to reproduce stably. However, it is almost always accompanied by the efforts of various factors (individual actors, groups, social relations, institutions, etc.) to legitimize discordant values. The normative system here "assists" in maintaining consistency, but cannot always maintain it.

this, we can mention increased restrictions on market-based financial dealings that had previously been regulated only through 'business practices' in the wake of the 2008 financial crisis (Krugman 2008, 2020; Stiglitz 2019), or 'emergent Keynesianism' policies that governments around the world were resorting to during the COVID pandemic induced crisis (Šumonja 2020).

At the end of this section a few additional remarks should be added to the problem of determining the relationship between changes to the social order and value and normative changes. When it comes to norms, the tendency is clear: the central normative system undergoes change as a consequence of changes to the order. Actors who occupy dominant social positions establish and maintain this system, which (on the basis of direct repressive apparatus and through 'tacit' assistance from the central value system) enables them to reproduce their status (the normative order in capitalism supports all fundamental relations necessary for the reproduction of capital but it is clear that capitalist relations are not a consequence/effect of the previously extant normative system). Only when elements of a new social order prevail, when emergent dominant groups establish control over the fundamental social resources, can they impose a central normative order that is supportive of their specific group interests on the society as a whole. The new central normative order then ensures the consolidation of fundamental social relations and the normative order on the surface appears as the basis from which prevailing social relations 'emanate'.

The relationship between the social order and central value system is more complex. Specifically, elements of a different (alternative) order begin to crystallize within a particular order over time and for various reasons, whether internal and/or external. This is, along with greater or lesser internal changes, the basis for the historical nature (transience) of existing social relations. A look at, for example, European society since the fifteenth century, reveals how, gradually, with the development of trade, transport and production, the elements of capitalist relations emerge within the feudal structures that had been experiencing decline for some time (Braudel 1992). The newly emerging capitalist social relations, within a dominant non-capitalist order, can give rise only to fragments of the new (alternative) value system, which spread through the development of these relations (Elias 1994, Weber 2010, Hirschmann 2013). But when structural elements of the new order develop significantly, the role of the values that develop within these structures (the 'Protestant ethic', for example) can become one of the decisive factors driving changes to dominant relations. And so, values become one of the factors that can lead to change. Support from these values can help mobilize members of the most diverse social strata, who are then able bring forth social revolution and establish a new order – in which they will again be relegated to subordinate social strata (Skocpol 1979).

Looking at the intrasystemic level, it is clear that a similar dynamic is established. At the foundational level, there are specific values typical for various historical 'phases' of a social order, determined by the specific structural characteristics (social relations) of these phases. Furthermore, at the foundational level of both lie the general traits of the prevailing social order, as well

as the central value system. However, in addition to these, a whole slew of other formational characteristics can emerge: elements of transhistorical values (of course, 'processed' in line with dominant relations), the interests of special social groups (which shape and are shaped by current social relations, such as social conflict), the degree of consolidation of the prevalent order (e.g., due to an ongoing economic or political crisis), etc.

Thus far in the paper we have defined and analyzed the concepts of values and norms, as well as their relationships to each other in the most general terms, as they are reproduced in human societies. More than once, however, we have mentioned that one of the constituent properties of human society is historicity. This means that over time, as a result of causes that cannot be expanded upon here, human communities change fundamentally and in such a way that the basic principles governing their reproduction also change. History is, therefore, witness to various aspects of change: civilizations, forms of production (hunting and gathering, herding, agriculture, industry, post-industrial society), levels of modernity (pre-modern or traditional, modern and post-modern society), socio-economic formations (early communities, slavery, feudalism, capitalism, socialism) and so forth. With this in mind, it is clear that the definitions of the notions that are the subject of this analysis (values and norms) must also be historically concretized so that they include social relations that determine the character of these specific social forms (dominant and central relations).

Bearing in mind, therefore, the immanent historicity of human society, the concept of values can, at the level of historical periods (social orders, etc.) be defined in the manner to be expanded upon here in these passages (in other words, the general definition must now be made more specific in order to adhere to the level of historical analysis). Dominant central values are imposed (through various instruments, including the repressive and mobilizing apparatus of the state, economic mechanisms for production, exchange and distribution of resources, securing the basic necessities and socializing processes – as part of the educational system, above all, calling upon cultural tradition and similar), or voluntarily accepted patterns of thought and action of individuals or social groups, according to which the basic principles of the reproduction of dominant social relations in that community (within economic, political and cultural subsystems) are presented as universally desirable patterns. Within this same analytical framework, dominant central norms are institutionally imposed patterns of actions of social groups and individuals that, through everyday practices, establish, reproduce and sustain dominant social relations in a given social order (and the violation of which is prevented with the threat of punishment).

These 'transitional' – due to the level of their generality – definitions lead us to further historical specificity, which pertains to definition of dominant and central values and norms in capitalism. Relative to the more abstract definition, here it is imperative to precisely set out the basic principles of the reproduction of this order and how they are shaped in terms of values and norms.

Values and Norms in Capitalism

As an example of how the interplay of values and norms leads to social dynamics, we will take the liberal form of capitalism, considering that, historically, it represented the first (or initial) form of regulation of this system. We have already alluded to the core constitution of the (ideal-type) liberal form of capitalist system: 1) in the economic subsystem, as a universal, profit-orientated market economy, in which mutually independent actors freely exchange economic resources, where private ownership predominates, while the state appears as a secondary transaction regulator; 2) in the political subsystem, as an area of free competition between political parties, under relatively equitable conditions, within which framework various social groups seek to gain control of the state apparatus in order to use its resources, promote primarily their own economic and social interests, and 3) in the cultural subsystem, as the opportunity for relatively free public discursive articulation of interests primarily of the dominant social group, presented as universal interests, on the basis of which the prevalent order is legitimized. Another idiosyncrasy of liberal capitalism is that these three subsystems are relatively autonomous one from another while the mechanisms of their regulation are different. The economic subsystem is dominated primarily by competition in the markets, the political system by political competition, and the cultural system by competition amongst idea-based orientations.

Mutual coherence in the regulation of these three subsystems is achieved by the fact that each relatively autonomous form of regulation is directed at supporting the other two. Autonomous market entities support political competition, the always temporary outcome of which promotes the interests of one (or more than one but never of all) group of these entities (class fractions), while the temporary nature of the outcome – the change of political parties in power – ensures that market entities retain their principled autonomy from the state apparatus and vice versa, that the state apparatus is free of lasting domination by particular groups of economic actors. Meanwhile, competition between idea-based orientations in the cultural subsystem ensures that parts of society will be mobilized to support the various forms of regulation in both the economic subsystem and the political subsystem. The focal point of the internal and mutual coherence of these different but essentially homologous regulatory principles is the tendency to ensure unhindered reproduction of profit-orientated commodity production, as well as fundamental social relations founded on the production of capital.

In other words, the source of the (dominant) central normative and value system in capitalism is situated in the production of capital. The central normative system in capitalism institutionally (repressively) guarantees the provision of the foundational preconditions for that production. In the economic subsystem this means protection of private property, protection of equal access for economic actors to the market, protection of contracts, etc.; in the political subsystem, the right to organize politically, the right to equal electoral

conditions for parties, the right to suffrage and the right to be elected, etc.; in the cultural subsystem this is the freedom of thought, speech and public debate, etc. As a rule, this normative order is shaped by constitutional provisions and/or in other legislative acts. Similarly, the central value system in capitalism is constituted around: 1) private property, which is the basis of the market economy; 2) ensuring the formal autonomy of market actors – companies, owners of capital and workers; 3) preservation of the general preconditions for maintaining and increasing private ownership (the sanctity of the contract); and 4) reproduction of the conditions in which the maintenance and accumulation of this ownership are ensured (the right to make profit and to use it for investment and consumption; the right to inheritance). The foundations of the value system in politics and culture are derived from this core. The starting point in the political subsystem is the state's duty to protect the aforementioned bases of the market economy (ownership, contracts, actor autonomy, etc.). Derived from this is the value of a pluralist (democratic) political order, with all of its characteristics (political rights and freedoms, equality before the law, the right to elect and be elected, separation of the legislative, executive and judicial branches, etc.). Finally, the values from within the cultural subsystem (reciprocally co-dependent), such as civil rights and freedoms (the freedom of thought and speech, public articulation of ideas and public debate), individualism, etc., rest on the foundations of the economic and political central value system.

It does not make much sense to try to list all of the values that make up the central value system in capitalism (i.e., in its three subsystems), given that their discursive formulation appears in various concrete historical guises. It is more important to instead emphasize that these values are not established only 'for themselves', as they are derived only from the manner in which capital production functions. Equally important for their formulation is opposition to alternative values, which advocate for fundamentally different principles for the organization of social reproduction, one variant of which was represented, from 1917 to 1990,[7] by the (dominant) central value system in socialism (for the purposes of brevity, such a system can tentatively be described as being 'in opposition' to capitalism; another possible alternative to the capitalist but also socialist central value system could be developed on the basis of the utopian ideal of a classless society but there is no space here for the discussion to take a turn in that direction).

At the end of this section, it is worth drawing attention to the following. Every central value system, that is derived from the way a particular type of social production is reproduced, is presented as necessarily universal, as manifestly,

7 Of course, in the case of China, this period is longer, bearing in mind that the systemic changes in this country over the last thirty years are unfolding in a direction that has not been satisfactorily theoretically resolved (the position that here too the key transition to a capitalist order has already taken place is supported by, for example, Milanovic [2019]. See also: Arighi [2009]).

or at least latently, applicable to human community in totality. A significant mediating role is played by the fact that, throughout history, some values appear to be transferred directly from epoch to epoch (justice, individual or group sacrifice for ideals, truthfulness, honor, etc.). This, however, neglects the fact that concrete definition of each of these values is historically contextualized, so that they are interpreted and understood differently in different epochs. Or, put more simply, that the criteria of justice in traditional societies are not the same as in so-called post-modern society. That is, what is taken to be a universal (trans-systemic or trans-historic) value is, as a rule, transformed by the central systemic values into forms that are adapted to these values or, at least, into a form that does not contradict them. Here is an example characteristic for capitalism: according to Christian postulates, the wealthy are expected to help the poor, either individually or via publicly controlled – e.g., state-led – redistribution. However, according to the systemic processing of this solidarity-oriented value, this assistance must not be such that it makes the poor workshy – they are, after all, presented as being responsible for their own station in life. On the other hand, partly seemingly perhaps – or rather, concretely historically mediated – the existence of such trans-systemic (transhistorical) values forces the actors operating within a central value system to such adaptation of the former to the latter.

Normative Value Dissonance

When the dominant means of reproducing social relations becomes the main source of the central (dominant) normative and value systems, then the possible existence of important disharmonies between the central normative and parts of the value system arises as one of the key problems – a phenomenon we have termed *normative-value dissonance* (NVD) (Lazić & Cvejić 2007, Lazić & Cvejić 2011).[8] The problem in the value-norm relationship can emerge for at least two reasons. One is that, as has been mentioned, along with central social relations, in every social order there are relations that are based on different grounds: those that remain from earlier orders (in capitalism, remnants of relations from feudalism or even slavery); or those that are potential alternatives to the current central relations (well-developed elements of the market economy in antiquity, for example, or socialist movements in nineteenth and twentieth century capitalist societies). Within these extra-systemic relations, values specific to them form and reproduce as developed by the actors within these relations. These values are different to those within the central value order, even to the point of being (potentially or manifestly) in conflict with the central norms protecting both the order and the dominant relations as a whole.

8 It should be noted here that we are primarily interested in the discrepancy that occurs between norms and (systemically induced) values, understood as ideals, world views or elements of the ruling ideology (trans-systemic and systemic values), which are then translated into more concrete elements of individual and group consciousness.

Thereafter, even within certain ways of producing society (or rather, certain historical epochs), social relations are dynamic (historical) phenomena, particularly in capitalism. Therefore, even partial changes, which do not intrude upon fundamental social relations and remain within the framework of the dominant order, as a rule result in changes to norms and also values – that is, to at least temporary deviations of parts of the central value system from the normative order. These two sources of possible conflict between norms and values lead to normative-value dissonance.

Due to the sources that cause it, this dissonance can appear in a number of forms. Conflict between the central norms and those values that are founded on social relations that are fundamentally different to dominant relations (and are, thus, not only external to the dominant and central value system but are also opposed to it: alternative values), will be termed *systemic dissonance* (for example, capitalist values that have, over time, taken shape within a feudal normative order, such as the appreciation of private interests as the highest values, surpassing honor).[9] This should be distinguished from *intrasystemic dissonance*, which occurs due to changes to partial structures within dominant social relations that do not intrude upon the bases for reproduction of that order (for example, the rise of neoliberal capitalist accumulation, which arose from the welfare states of the early 1970s).

Drawing a distinction between *systemic* and *intrasystemic* dissonance points to a further differentiation of these very forms. When it comes to *systemic* dissonance, conflict can arise between the central normative order and the parts of the value system that are remnants of pervious types of society. This dissonance will be termed *regressive* (the values of a feudal society within a capitalist order: for example, aristocratic titles often have a significance in terms of status even today). As a rule, this type of dissonance occurs during the initial period of constituting a new dominant system of social relations or due to the lasting survival of actors from previous periods. In other words, *regressive* dissonance appears when new social relations are being established but old social relations have yet to fully dissipate. It is, therefore, typical for individuals and social groups for whom the old values, characteristic of the previous order and inconsistent with the new central values, survive for at least a time. *Regressive* dissonance can be powerfully articulated at times of crisis during the constitution of a new order, such as is evident from the example of various countries' experience of post socialist transformation. Such powerful (or, more to the point, growing) *regressive* dissonance can slow the establishment of systemic change or can reshape changes so that they limit the development of relations that are key to reproduction of the (new) social order.

On the opposing side, conflict can occur between currently dominant social relations and potential forms of social production (an emerging alternative social order). This conflict can result in a clash between values characteristic of

9 For a detailed historical case study (of course, using a different categorisation mechanism), see: Hirschmann (2013).

this potential, alternative order – which are external to the central value system – and the central normative order. This phenomenon will be termed *prospective* normative-value dissonance. For instance, from the late 1960s some values typical of capitalist social relations, such as the emphasizing of political pluralism (democracy) as a value or the effectiveness of market regulation, spread to socialist societies (Prague Spring, for example), intensifying from the 1980s (such as in Poland, Hungary, etc.). *Prospective* dissonance can contribute to the acceleration of the collapse of the ruling order and contribute to more rapid establishment of new foundational social relations.

Similar conflicts can arise as a result of *intrasystemic* dissonance. In capitalism, therefore, the values characteristic of the previous form of accumulation can be retained within the following regime. Structural elements of the welfare state – and the corresponding elements of the value system – survived during the period of neoliberal regulation, to differing degrees in different states, due to (political, social, etc.) pressure by actors from various social groups, as they were considered civilizational achievements and, hence, as lasting values (such as financial government assistance for the unemployed, the rights to education and healthcare and so forth). This dissonance will be termed *intrasystemic regressive dissonance*. If sustained on a larger scale, it can also slow processes of intrasystemic change. At the same time, it is clear that this deceleration need not necessarily have a negative impact on the reproduction of dominant relations. In all of the countries of the capitalist center, the 2008 financial crisis resulted in mass regulatory and financial intervention by states, primarily in the form of assistance for jeopardized financial institutions, in contradiction to previous normative and value restrictions on such interventions. This made it possible to overcome a deeper economic crisis, at least for a time. Similarly, state interventions to maintain employment levels and other forms of large-scale financial aid to private companies and employees, as evident in many countries during the current Covid-19 pandemic, are reminiscent of pre-neoliberal economic policy (Teulings and Baldwin et al. 2014)[10].

In the same manner, we will call the spread of values that support changes to certain structural elements of the prevalent social order but retain foundational values (for example, the influence of the so-called Chicago School of economic thought that appeared prior to the execution of normative changes to the regime of accumulation – characteristic of the USA during the Reagan administration or the United Kingdom under Margaret Thatcher) *prospective intrasystemic dissonance*. It is important to point out that the terms prospective and regressive must not be interpreted on a value scale (in the sense of positive/good or negative/bad outcomes). They signify exclusively a historical dynamic: indicating what came before, what may have come before, what followed or what may follow the moment that is selected as the initial point of analysis.

10 Also, see: https://www.whitehouse.gov/briefing-room/statements-releases/2022/02/24/the-biden-harris-plan-to-revitalize-american-manufacturing-and-secure-critical-supply-chains-in-2022/ (last accessed: June 24, 2024).

These distinct forms are derived, of course, according to the methodological principle of constructing 'ideal types'. It should be noted, in this regard and applying the same methodological key, that it must be assumed that the normative system, due to its institutional and coercive nature, is in principle at least tendentiously internally consistent. The norms of the central normative system must consistently support the conditions that ensure the reproduction of dominant social relations. This applies to both analytical frameworks: the abstract (theoretical) and the concrete historical. When it comes to values, however, in the concrete historical case, this consistency is difficult to achieve for two reasons. Firstly, social relations in the empirical world are, as a rule, of the hybrid type (whereby their hybrid nature is confined to the framework of the dominant social form), in which alternative and peripheral values, inconsistent with the central value system, nonetheless always coexist with it. Moreover, the perseverance of transhistorical values behaves in the same way, even though they are in a permanent state of harmonizing with dominant values, they nevertheless retain a certain degree of autonomy. The absence of complete consistency in terms of values can, as a rule, be registered empirically both at the individual and the group level. In other words, it is possible to confirm on the empirical level that individuals and groups hold values that are not consistent with one another (and which exist within the central value system, which they support, as well as also existing within alternative/peripheral value systems). This phenomenon, which is all the more likely if normative-value dissonance is pronounced, can be termed *value confusion*.

The degree to which *normative-value dissonance* is pronounced is clearly directly linked to the conditions in which the reproduction of the dominant system of social relations takes place. Its growth indicates growing problems with this reproduction, while its decrease can signal progress in the unhindered development of reproduction. The harmonization of norms and values, a result of the tendency of dominant social relations to impose themselves as a comprehensive framework for the reproduction of social life, is a lasting social process. Just as is the case with rising or falling NVD, this harmonization is dependent on the concrete historical circumstances. A rising NVD can, for example, be the result of an influx of new social relations (in the case of prospective systemic dissonance) or of the persistence of old value patterns in a new order, which hinders its complete establishment (*regressive systemic dissonance*). Further, in the dynamic forms of social reproduction characteristic of capitalism, in which regimes of accumulation change at intervals of fifty years, *intrasystemic* dissonance must be more pronounced than in orders that change only slowly.

Conclusion

As we have seen, the relationship between values, norms and social dynamics is complex. Therefore, it should not be taken as a pretentious claim that our approach to values and norms is also multi-layered. On one hand, we can

consider it systemic, since it understands values and norms as the basic factors that contribute to the legitimation of the system. At the same time, this approach is suitable for grasping social dynamics, because it argues that the interplay between values and norms, which appears as a consequence of changing social relations, can itself be the agent of social change. Furthermore, this approach is critical, and, in contrast to dominant approaches in sociology, it points out that values and norms can have a disintegrative impact on the dominant system of social relations, in addition to an integrative one. Simultaneously, it represents a kind of a hybrid standpoint that combines elements of the two opposing perspectives in sociology – Marxism and functionalism – by highlighting the system's continual need to achieve integration (at trans-systemic and systemic levels), but also by pointing out that this necessity arises from the inherently conflictual nature of social relations that makes complete integration unattainable.

The innovativeness of this approach consists in the effort to point out the possibility that, when studying the relationship between values, norms and social change, the analysis develops at different levels of abstraction: at the most general level, values appear as a transhistorical phenomenon, necessary to maintain any social community; at the level of the concrete form of production of social life, they are emanations of the conflicting character of the key relations in society, and appear not only as an integrative, but potentially disintegrative factor; finally, at the level of individual or group consciousness, values are imposed, through consent or coercion, and represent landmarks of action and thought, although even at this level one should not expect complete alignment between the reproduction of the system and individually adopted values. Then, this approach argues how the dynamics of the relationship between values and norms can be a factor of social change: a discrepancy between values and norms can indicate a potential systemic or intra-systemic changes, but also reduced possibilities of reproduction of the dominant system of relations. This approach also points out that not all relationships in society should be considered as equally important for the reproduction/change of the system, and this also applies to the values and norms that regulate individual and group behavior. Having this in mind, a clear distinction is made between central and peripheral values and norms, indicating that only discrepancy between central values and norms can have a potentially disintegrating effect on the system, while in the case of peripheral values and norms this does not have to be the case. Finally, this approach clearly indicates that neither at the systemic nor at the group or individual level should we expect complete harmony between values. This value inconsistency arises from the fact that within each social order, alongside the dominant mode of production and organization of social relations, alternative modes also develop or endure, leading to emergence of competitive (dominant and alternative) value orders (which are themselves a reflection of potential or past social dynamics). However, as is clear, this alone does not exhaust the list of possible reasons for inconsistences that appear between values.

Of course, it is also clear that this approach has its shortcomings, and therefore we consider it a kind of blueprint that can be further developed and refined. This remark certainly refers to the fact that at each of analytical level we can go further in conceptualizing the nature of relations between values and norms, as well as the conditions in which discrepancy between them appear. Such further elaboration of the analytical framework may point to some other consequences that the aforementioned interplay between values and norms may have on social dynamics. Finally, despite the fact that most of the examples offered as illustrations of general claims are closely related to the capitalist system, we believe that this approach is formulated in a sufficiently general way to transcend the narrow historical context, and to offer a foundation for broad analytical utilization.

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Vrednosti, norme i društvena dinamika

Apstrakt

Cilj ovog rada je da ponudi drugačiji pristup teorijskoj konceptualizaciji vrednosti i normi i njihovog međusobnog odnosa. U okviru ovog stanovišta vrednostima se pristupa kao faktoru koji može da ometa integraciju postojećeg poretka i potencijalno doprinese krizi njegove reprodukcije. Odnos između vrednosti i normi je definisan kao potencijalno asimetričan. Iz ove asimetrije proizilazi koncept normativno-vrednosne disonance, koji ukazuje na dinamički karakter odnosa između promena dominantnog sistema društvene reprodukcije i promena vrednosti i normi. Normativno-vrednosna disonanca se dalje može razložiti na sistemsku normativno-vrednosnu disonancu, koja nastaje kada vrednosni i normativni poredak nisu usklađeni usled promena sistema društvenih odnosa u celini, i na intrasistemsku, koja nastaje usled promena u okviru dominantnog društvenog poretka, bez promene osnova na kojima se zasniva.

Ključne reči: vrednosti, norme, normativno-vrednosna disonanca, dominatne i alternativne vrednosti, centralne i periferne vrednosti i norme.