

# Polarity Shift Is What States Make of It: Capturing the moment of Bipolarity

## Introduction

A growing body of scholarship argues that a U.S.–China bipolar system has emerged, based on material indices such as GDP and military expenditures (Tunsjø 2018b, a; Lind 2024; Kupchan 2021; Maher 2018). According to these studies, polarity is defined by the number of great powers and great power status is measured by the distribution of material capabilities. However, existing literature that argues the U.S.-China bipolarity rarely identifies or explains the specific moment when a polarity transition occurs. This gap exists because structural realism has not thoroughly theorized polarity shift. This paper aims to address this gap by developing a theory to redefine polarity that incorporates distribution of knowledge, and by employing computational text analysis approach to identify the moment of polarity transition. While this study accepts that polarity is grounded in the distribution of material capabilities, it advances a constructivist argument that polarity and its change must also be analyzed through states' perceptions and intersubjective understandings of great power status.

## Literature Review

According to Waltz (1979, 79), the international system is composed of a structure and of interacting units. Polarity refers to the international political structure, while the units are sovereign states. For an international system to change, the components of the structure must change. That is, the distribution of capabilities is the only variable that distinguishes polarity by counting the number of great powers. Waltz (1979, 1964, 1993) classified the international system as multipolar before 1945, bipolar between 1945 and 1991, and unipolar after 1991. Subsequent realist

scholarship has largely taken these distinctions for granted (Mearsheimer 2019; Gowa and Mansfield 1993).

However, this structural realist theory is limited by the arbitrariness of counting great powers and lacks explanatory power for systemic change. Brooks and Wohlforth (2015) argue that the concept of polarity is ill-suited to assessing change within an international system because it promotes dichotomous thinking and relies on overly broad transhistorical measures of power.

### Theoretical Framework

Nevertheless, we maintain that polarity remains a useful concept for explaining changes within a system if it is redefined under a constructivist framework. Constructivist critiques have argued that polarity is social as much as it is material (Finnemore 2009, 2013; Koslowski and Kratochwil 1994). Bull (1977) and Buzan (2004) treated great powers not merely as concentrations of material capabilities, but also as a socially recognized status—powers recognized by themselves and by others.

This research redefines polarity based on Wendt's critique of the Waltzian concept of structure. According to Wendt (1992, 395-397), for the distribution of power to exert a causal effect on state behavior, it must depend on intersubjective understandings—on the “distribution of knowledge.” Grounded in Wendt’s systemic constructivism, polarity is defined by both the distribution of power and the distribution of knowledge as necessary conditions.

The main argument of this paper is that polarity change needs to be understood not only in terms of the distribution of material power but also the distribution of knowledge to identify the moment of polarity transition. Even when material capabilities have shifted, the recognition of a great power depends on cognitive critical junctures that is intersubjectively constructed.

## Research Design & Contribution

Firstly, this paper reviews existing literature that maintains the current polarity is U.S.–China bipolarity based on material distribution by comparing it to U.S.–Soviet bipolarity. Second, to measure time-series changes in the distribution of knowledge, we analyze a corpus of global news and government reports from the U.S., UK, Canada, China, Japan, and Russia, covering 1940–1960 and 2000–2024. This study employs term frequency analysis and topic modeling to track the salience of great power discourse, while utilizing Word2Vec-based semantic axis projections to quantify the shifting status of state actors. We project state vectors (e.g., China, the Soviet Union) onto a two-dimensional semantic space where the x-axis represents recognized material power and the y-axis represents social recognition and leadership. Finally, we characterize it as cooperative, competitive, or adversarial based on text analysis results, compared to evidence from U.S.–Soviet bipolarity.

Preliminary findings indicate that the transition to U.S.–China bipolarity occurred around 2017–2018. By juxtaposing this with the U.S.–Soviet transition, we will demonstrate that polarity shifts are not merely material re-rankings but intersubjective phenomena marked by recurring discursive patterns. This research offers two primary contributions: (1) a theoretical synthesis of realist material power and constructivist distribution of knowledge, and (2) a methodological bridge applying computational text-as-data to systemic constructivism.

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