



## The Globalisation Discourse

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NCCR North-South Dialogue, no. 4

2007

*dialogue*



The present study was carried out at the following partner institutions of the NCCR North-South:

IP DSGZ of WP2 (Livelihoods and Globalisation),  
Development Study Group Zurich (DSGZ)  
Department of Geography  
University of Zurich



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The NCCR North-South (Research Partnerships for Mitigating Syndromes of Global Change) is one of twenty National Centres of Competence in Research established by the Swiss National Science Foundation (SNSF). It is implemented by the SNSF and co-funded by the Swiss Agency for Development and Cooperation (SDC), and the participating institutions in Switzerland. The NCCR North-South carries out disciplinary, interdisciplinary and transdisciplinary research on issues relating to sustainable development in developing and transition countries as well as in Switzerland.

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**2007 [2003!]**

**Citation**

**Backhaus N.** 2007. *The Globalisation Discourse*. 2<sup>nd</sup> edition [2003<sup>1</sup>]. NCCR North-South Dialogue No 4. Bern, Switzerland: NCCR North-South.

**Note on earlier version**

The first edition of this publication was entitled *The Globalisation Discourse* (NCCR North-South Dialogue. IP 6 Institutional Change and Livelihood Strategies, Working Paper No. 2, Bern: NCCR North-South).

**Editing**

Stefan Zach, z.a.ch gmbh

**Cover photo**

Entrance to the former 'Ranbobar' in Lhasa, Tibet. The old quarter beneath the Potala was torn down at the end of the 1990s. (Photo by Norman Backhaus)

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Figure 1: The web of discourses within the globalisation discourse. Source:  
Own draft based on Jäger (1993).

# 1 Introduction

Most people experience globalisation as an economic process that affects the prices of goods and services, as job opportunities, or as a proliferation of communication technology and information. The term ‘globalisation’, that entered the Oxford English Dictionary in 1962 (Waters, 1995 in Werlen, 1997: 231) and became common usage in the 1990s, is nowadays often equated with external forces that urge governments to liberalise their economies and open their markets to foreign investment and business. For many people it has thus become a synonym for the negative consequences attributed to liberalisation, such as declining wages, increasing pressure on the workforce, decreasing prices for cash crops, etc. These aspects are indeed a part of important debates about how the global economy works and how it should be shaped. However, there is more to globalisation than just the global economy and globe-spanning communication. There are also scientific approaches that could facilitate a better understanding of globalisation’s (highly complex) processes and the role of the individual in these processes. It is the aim of this paper to highlight different aspects of the phenomenon called globalisation and different approaches to grasping it theoretically.

First it will be explained how globalisation can be perceived as discourse. Second, the most important topics in this discourse, and its most controversial threads, will be discussed. Third, different aspects of scientific discourse are described, and finally, as an example of scientific discourse, debates about globalisation in India will be briefly analysed.

This introduction ends with a short definition of globalisation, based on the theory of structuration (Giddens, 1995). Since globalisation is a highly controversial concept, many definitions are in circulation. The NCCR North-South (Hurni et al., 2004: 13) defines globalisation very broadly as “increasing interlinking of political, economic, institutional, social, cultural, technical, and ecological issues at the global level”.<sup>1</sup>

The present paper will use the following definition: *Globalisation is a result of the increasingly (spatially and temporally) distanced consequences of everyday actions. It is a process that comprises not only economic activities but virtually every aspect of people’s lives. Globalisation has to be understood as an aggregation of intended as well as unintended consequences of actions. It is therefore neither goal-oriented nor an external force, and it can be simultaneously homogenising and fragmenting.*

A few explanations to clarify some terms and expressions used in this definition may be useful. An *everyday action* that has *spatially and temporally distanced consequences* is, for instance, driving a car. This simple action can have an impact on many

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<sup>1</sup> It seems necessary to add a note on the term ‘global change’, which is sometimes used as equivalent to globalisation. The NCCR North-South (Hurni et al., 2003: 13) defines this term broadly as “global-scale human, human-induced, and natural changes that modify the functionality of the natural, social, economic, and cultural dimensions of the earth system”. Other organisations (e.g. Proclim, 2003) define it as climate change. In the present paper, in order to avoid misunderstanding, ‘global change’ will not be used in the broader sense (or even as a synonym for globalisation) but rather as equivalent to climate change.

people in spatially distanced (but also nearby) areas virtually all over the world. The combustion of petrol has an impact on people in oil-producing countries. Depending on the price of oil on the world market, this impact varies. Moreover, the production of exhausts has temporally distanced consequences inasmuch as it contributes to climate change. Every action has consequences, even the decision *not* to do something. Some consequences are *intended*, e.g. covering distances in a short time by driving a car. But others are *unintended*, such as air pollution as a result of the same activity. Moreover, globalisation as a process cannot be *goal-oriented* even if there are people or groups who would like to shape the process in a certain way. First, there are many different and opposing opinions about the shape that globalisation should take. Second, the unintended consequences of actions cannot be entirely controlled. Globalisation is not *external* to the lives of virtually every human being on the planet. Although many processes are beyond the control or influence of most individuals, all people are part of globalisation by virtue of their actions. Even isolated tribes living in remote areas contribute to globalisation by the fact that they choose to keep their lifestyle, because they are often threatened by processes of globalisation (e.g. the timber trade) and because there are local and international groups engaged in the protection of their environment. Globalisation is often equated with *homogenisation* (i.e. McDonaldisation, Americanisation), and indeed many of its processes have homogenising effects. For example, the spread of the English language as a global *lingua franca* and the dissemination of standardised computer software are such homogenising processes. However, fragmenting processes are also part of globalisation. Examples include the movement against the Anglicisation of European languages or the development of software alternatives to Microsoft products.



## 2 Globalisation as Discourse

We refer to globalisation as discourse because it is a phenomenon or process for which there is no clear and widely acknowledged definition, and because people talk and write about it. In doing so, they engage in debates or discussions about the issue, and thus generate a discourse. The discourse on globalisation is not uniformly shaped; it consists of different threads relating to different aspects and notions. The following paragraphs outline what a discourse is and which discourse threads can be found within the overall discourse on globalisation.

### 2.1 Discourse

With regard to the term ‘discourse’, the name of Michel Foucault, who examined the subject during the 1970s and 1980s, is often mentioned. According to Foucault, discourses are the conditions of social practices and agencies. They are based on an interlacing of knowledge and practice and share the following characteristics: they exclude certain topics but also certain individuals, they organise (discourse-specific) rationality, and they claim to be true (Fuchs-Heinritz et al., 1995). Thus, discourses are public, planned and organised discussion processes, dealing with topics of public interest and concern (Keller et al., 2001).

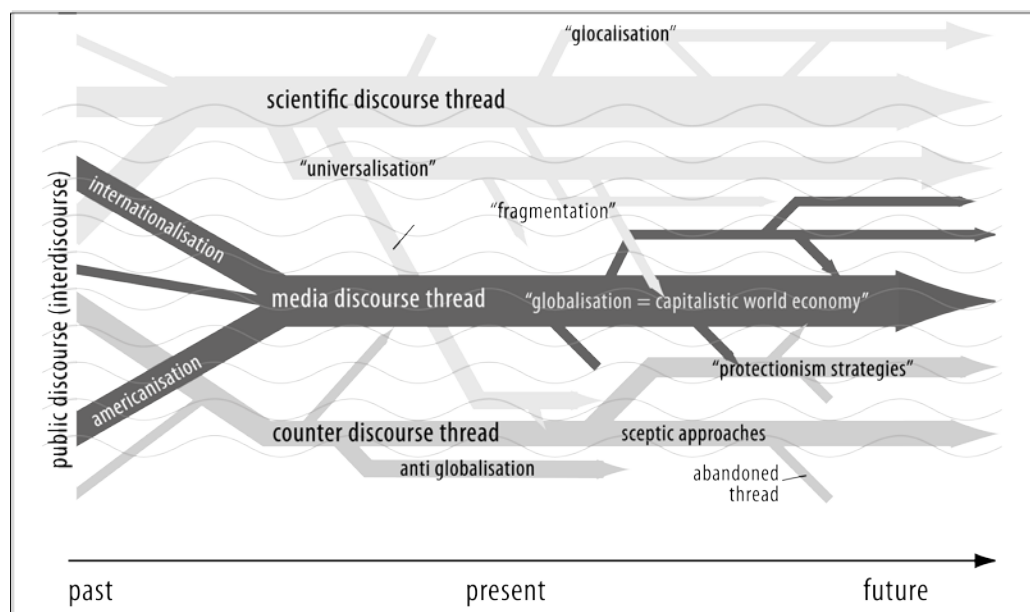
Individual texts belonging to a discourse are called discourse fragments. They relate to other texts or fragments in a way that is regulated by the discourse. A discourse is established if practices continue to relate to it in a structured way. Discourses are the result of people’s daily making of history; they change over time and can become more powerful or vanish (see Figure 1). Since people are embedded into social and historical contexts in which knowledge is handed down over generations, written or spoken text is never only individual but features social aspects as well (Hoffmann, 1999). Therefore, discourses transport knowledge with which people interpret and shape their environment. All people involved in a discourse shape or structure it, but rarely does a single person or group determine its shape and outcome (Jäger, 1993). “In other words, social reality is produced and made real through discourses, and social interactions cannot be fully understood without reference to the discourses that give them meaning” (Phillips & Hardy, 2002).

The discourse on globalisation is relatively new. As mentioned above, the term ‘globalisation’ only entered mainstream language in the 1990s. However, it quickly took hold, and today people relate to the phenomenon of globalisation in many contexts of everyday life (Marshall, 1996).

### 2.2 Types of discourse

As mentioned above, a discourse is not an aggregation of uniform texts that all point in the same direction. If this were the case, a discourse would most certainly soon cease to exist since it involves discussion, and discussion presupposes that different opinions are expressed. Most discourses are controversial and change regularly. Texts – or discourse

fragments – that relate to the same aspect of a discourse and share the same opinion, form a discourse thread. The different threads interrelate and influence each other. Within a broad discourse such as that on globalisation, we usually discern between the ‘media discourse’ and ‘special discourses’ such as the ‘scientific discourse’ and ‘counter discourses’, in which ideas opposing the main notion of a specific discourse are discussed (Jäger, 1993). As shown in Figure 1, there is also a public discourse, which includes the media discourse but also parts of the scientific and counter discourses. The public discourse can be called inter-discourse too, because it comprises discourse fragments that are accessible to the public at large and shape the way in which they discuss the issues of that discourse. The use of the term ‘discourse’ in this paper, instead of ‘discourse thread’, shows that such categorisation depends on one’s point of view and is a matter of scale.



**Figure 1:** The web of discourses within the globalisation discourse.  
Source: Own draft based on Jäger (1993).

### 2.3 Categories of current scientific globalisation discourse

The discourse on globalisation has increased considerably during the last decade and currently has a negative bias due to the looming global economic recession. If we compare the different parts of the globalisation discourse, we can see that the scientific discourse comprises a larger variety of topics than the public discourse (Hoffmann, 1999). Although the scientific discourse is interrelated with the public discourse, there seems to be little permeability between them. In the following paragraphs, the most

important topics of the scientific discourse will be presented, drawing on the ‘categories of globalisation’<sup>2</sup> defined by The Group of Lisbon<sup>3</sup> (Gruppe von Lissabon, 1997):

1. The *globalisation of finance and capital holdings* is currently one of the most prominent and advanced processes. Although capital has been moved around the world for centuries, it is the speed with which it is moved and its amount that have become staggering in the last two decades. There is news almost daily on mergers, take-overs and concentrations of enterprises in big corporations.<sup>4</sup> In addition, the mobility of capital increases as a result of the current possibilities of telecommunication. Within split seconds, large amounts of any currency can be transferred<sup>5</sup> to where they bring the most profits. During the 1960s there were roughly 7,000 transnational corporations (TNCs) worldwide, whereas this figure was estimated to have risen to 40,000 by the mid-1990s. Consequently, they have an increasing share of the world market: it is estimated that today around 40% of world trade is intra-corporate trade (Chomsky & Dieterich, 1995).
2. Therefore, it does not come as a surprise that the *globalisation of markets and market strategies* is an important category in the public discourse. Business procedures become increasingly integrated and standardised with the aim of reducing friction losses – i.e. transaction costs – in production processes. Consequently, it becomes less important where goods and services are produced. Thus, components of a product can be bought anywhere in the world, which increases competition and causes prices to fall. Negative consequences of this standardisation include the loss of jobs in countries with high costs of labour, and job insecurity in developing countries.
3. The *globalisation of technology, knowledge and research* makes it much easier to acquire information about sales markets and about where components can be bought cheaper. Especially in industrialised countries, technology is used to increase competitiveness, which in many cases makes human labour redundant. Often the production of (high-tech)

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<sup>2</sup>Giddens’ four dimensions of globalisation – ‘capitalistic economic system’, ‘international labour division’, ‘nation state’ and ‘military system’ (Giddens, 1996: 93) – are roughly congruent with the categories of The Group of Lisbon, which is why they are not included in the elaborations of this chapter.

<sup>3</sup> The Group of Lisbon consists of renowned scientists and practitioners from Europe, Japan and North America. It deals with the development of globalisation and formulates policies for a sustainable and responsible form of economy.

<sup>4</sup>Such concentrations of enterprises continue unabated to this day although many companies have experienced (financial and cultural) problems after a merger (e.g. AOL and Time Warner).

<sup>5</sup>Capital, however, can also be withdrawn quickly, which was a major problem for many countries during the ‘Asian currency crisis’ in 1997/98, when more than 100 billion US\$ were withdrawn from the Asia within a few days (Golub, 1998).

goods and services is accompanied by rationalisation measures and outsourcing, which gives rise to uncertainties and fears among the workforce.

4. Due to the increasing power of TNCs, new *possibilities of regulation and steering* political and economic processes have emerged. National economies have become less important and nation states now have less influence on production and markets. In the current neo-liberal economic mainstream, which propagates liberalisation and privatisation, national borders are much more permeable to trade. The World Trade Organization (WTO) as a global player has become a major force for the implementation of neo-liberalism. However, although the WTO as a supra-national organisation is regarded as a powerful agent enforcing new economic regulations, it is not an independent institution. It is governed by (powerful) nation states that try to push their interests through. The United Nations (UN) attempt to establish political regulations on the global level (e.g. with their human rights or peace missions), but they are even less able than the WTO to achieve anything without the consent of key nation states, above all the USA. Another aspect of this category is the increasing decentralisation within nation states as a means to make regions more competitive and more responsible.
5. Although the power of supra-national organisations is limited, we experience a *political coalescence of the world*. The UN peace missions attest to the will to enforce political stability in the world. The growing European Union (EU) represents a regional integration of nation states which regulates many issues that previously were under the exclusive jurisdiction of individual nation states. However, these organisations are based on a voluntary association of nation states and can, therefore, not be seen as a sign for the disbandment of the latter.
6. Since the economy is a major force of globalisation, it also affects *consumer behaviour and lifestyles*. However, especially people's lifestyles are influenced not solely by production and markets, but also by cultural globalisation. An increasing amount and also variety of cultural messages are available to an ever-growing public. These messages are disseminated by the media – in the form of TV broadcasts, movies, newspapers, magazines, books, music, etc. – that are dominated by a small number of global corporations, but also through people's integration into global production processes and cycles. One consequence of these processes is a levelling of communication forms and languages, with English establishing itself as a global lingua franca (Le Monde Diplomatique, 2003).
7. It is mostly through the media that people realise that they live in one world. However, the *globalisation of perception and consciousness* does not necessarily mean that people's perceptions become homogenised. It can even breed opposition when people are confronted with cultural messages that are incompatible with their own cultural norms and values. The

knowledge about and confrontation with other lifestyles and ideologies can cause people both to be more conscious of their own culture and to adopt traits of other cultures.

These categories of globalisation are intertwined with one another and there are different opinions about their relative importance. Whereas the categories can be regarded as the arenas in which globalisation processes take place – and which, as such, are the subject of extensive research in various fields – the threads of the discourse, discussed below, describe people’s perception and evaluation of developments in these arenas

## **2.4 Threads of globalisation discourse**

It was shown above that globalisation encompasses a great variety of processes that are part of or affect the livelihoods of many people (if not of all people) in different ways. Accordingly, there are different opinions about the impacts of these processes and whether or not people in general, or certain groups of people, can benefit from them. Some of these contrasting notions (mostly within the scientific discourse) are discussed in the following sections.

### **2.4.1 Optimism versus pessimism**

Within the scientific discourse there are only few authors who unquestioningly favour globalisation the way it is working now. Positive evaluations are often followed by an “if-clause”. This will not surprise us if we take into account the looming global economic recession, the increasing number of poor people worldwide and the seemingly endless conflicts in the world. Indeed most books and articles express a negative view of the current state of globalisation, but try to point out directions in which globalisation should develop in order to have mostly positive consequences.

Kenichi Ohmae can be regarded as an advocate of neo-liberalism and thus is in favour of many current thrusts of globalisation (Ohmae in Schirato & Webb, 2003: 36-37). In contrast to Fukuyama’s dictum that we have reached the end of history, Ohmae emphasises that an increasing number of people are entering history with their economic demands. Thus he presumes that all peoples and cultures want to share the benefits of globalisation and subscribe to a capitalist, commodity-driven world view, or in other words that they want to attain Western economic standards. In the neo-liberal and capitalistic world view, this effort to catch up with the West will be most successful if there are no barriers to free trade (e.g. import tariffs or other measures to protect a national economy). Ohmae argues that “[e]conomic activity tends not to follow the artificial boundary lines of traditional nation states, or even cultural boundary lines. It follows information-driven efforts to participate in the global economy. Physical distance has become economically irrelevant. Economic borders have meaning as contours of information flow – where information reaches, demand grows; where demand grows, the global economy has a local home. [...] If governments hold on to economic control for too long, it will become worthless and expensive, and the global economy – which could rush in to help – will be kept out” (Ohmae in Stonham, 1996: 109-110). Essentially the Bretton Woods organisations – International Monetary Fund (IMF) and

World Bank – as well as the WTO subscribe to this point of view, although they admit that in the past some developing countries suffered from the negative aspects of the capitalist system (Schirato & Webb, 2003: 33-84).

Although there are many critics or sceptics of globalisation, there are only few who perceive it as completely negative. Most critics say that globalisation has positive and negative consequences and that at the moment the balance tips in favour of the latter. Consequently, sceptics of globalisation (Baudrillard, 1998, Bourdieu, 1998) maintain that the despair of those excluded from the world system manifests itself, for example, in terrorist acts against symbols of Western capitalism or dominance (e.g. the terrorist attacks of 11 September 2001). Besides terrorism, which is probably the most extreme negative aspect associated with globalisation by some authors, it is mostly the growing divide between rich and poor, the nation state's loss of control and influence, the changes in or erosion of culture, as well as environmental pollution that are regarded as negative consequences (e.g. by the following authors: Albrow, 1998; Altvater & Mahnkopf, 1996; Appadurai, 1996; Augé, 1995; Barber, 1995; Bauman, 1997; Beck, 2002; Beyer, 1994; Chomsky & Dieterich, 1995; Greider, 1998; Gruppe von Lissabon, 1997; Kagarlitsky, 2000; Klingebiel & Randeria, 1998; Menzel, 1998; Novy et al., 1999; Robertson, 1992; Sassen, 1998; Schirato & Webb, 2003; Schmidt, 1998; Tomlinson, 2000).

However, these authors not only criticise, but also propose ways to change the current direction of globalisation so that it solves more problems than it causes. For most of them the key to a more social and just globalisation lies with the concepts of 'state' and 'democracy'. Whereas some favour a strong state that is able to check the influence of TNCs in order to ensure a certain standard of welfare within their boundaries (see for example Bourdieu et al., 1997), others opt for a new (cosmopolitan) concept of state which is not necessarily bound to a specific territory (see especially Beck, 2002; McGrew, 1998; Tomlinson, 2000).

#### 2.4.2 Homogenisation versus fragmentation

In the public discourse, globalisation is usually understood as a process through which societies and cultures become unified in some way or other. Globalisation is, therefore, often perceived as a synonym for *homogenisation*. Indeed there are many aspects that support this point of view:

- The way in which goods and services are produced or rendered is standardised in a way that increases compatibility considerably. Virtually no car is assembled any more exclusively from parts that have been developed and produced in a single factory.
- Most personal computers are configured with identical software, which allows the easy global exchange of documents. Mobile phones are compatible with the radio networks of different countries, which enables their users to use them wherever there is such a network.

- Global food chains – e.g. McDonalds (Geisel, 2002) – serve the same food in the same manner all over the world, and the same fashion brands can be found in any big city.
- The same music is broadcast by radio stations all over the globe.
- Many movies (especially those from Hollywood and increasingly those from “Bollywood”) and TV series are watched by an increasingly global public.
- In many parts of the world, English has become the lingua franca for communication.

Consequently, many aspects of people’s everyday lives are in the process of being standardised or homogenised, across large distances and across different cultural backgrounds. It is sometimes surprising how easily some aspects of homogenisation that are regarded as useful and handy are accepted (e.g. mobile phones or plastic containers), whereas others are rejected vehemently and perceived as a threat to one’s own culture or identity (e.g. pop music, movies). This happens especially when culture and tradition are perceived as being connected with a certain territory and when the process of change is viewed as coming from outside that territory (Backhaus & Hoffmann, 1999; Bauman, 1999). Reactions to tendencies of homogenisation can be as mild as a radio station’s decision not to neglect productions from its own country and as harsh as the stance that everything coming from “the West” is evil that has to be banned.

Such reactions can be regarded as *fragmentation*. From a theoretical point of view, they are also part of globalisation because they mostly relate to globalisation processes. Here the differences between the scientific discourse and the public discourse are quite significant. While opposition against (some) homogenising processes (see for example Bové & Dufour, 1999) of globalisation – mostly referring to its negative economic consequences – is almost invariably depicted as ‘anti-globalist’ in the media, many scientists see it as part of the same process (Barber, 1995; Beck, 1997; Beyer, 1994; Dicken, 1998; Giddens, 1991; Nederveen Pieterse, 1995; Robertson, 1992, 1995; Sassen, 1998).

Often an aspect of one’s own cultural background becomes “visible” only when one is confronted with cultural messages that deal with the same aspect differently. In the course of globalisation, the Balinese, for example, went through various stages of perception regarding their religion (Backhaus, 1996, 1998; Hobart et al., 1996; Kaler, 1993; Leemann et al., 1987; Picard, 1995; Ramstedt, 2000; Vickers, 1989; Wälty, 1997); in Japan, discussions about local and national identity were launched (Bauman, 1997); in Europe, local markets with local products were revived (Hard, 1987).

The concept of the nation state may be seen as an example of homogenisation and fragmentation at the same time. Each nation state delimits social, economic, political and jurisdictional aspects of its society against other nation states in some way or other, and thus the world’s societies are fragmented into different nations. However, the concept of the nation state can also be regarded as a homogenising process, because it regulates all kinds of communication between different countries, which reduces complexity and uncertainty.

These examples show that while globalisation is often only seen as a homogenising force, there are fragmenting consequences that are also part of the same development.

### 2.4.3 Global versus local

Along with the myth that equates globalisation with the triumph of culturally homogenising forces, the related process is often regarded as something big, all-embracing that can only be analysed on the macro-level. However, globalisation becomes most comprehensible on the micro-level, in the locality, in cultural symbols and in one's own life. Moreover, one consequence of globalisation is the contraction of local cultures; Beck (1997) even calls it a "clash of localities". Therefore, the local should not be seen as the opposite of the global, but as its counterpart. Because, if we look closely, we see that almost all consequences of globalisation are localised. Even what is probably the most global aspect of globalisation, the internet, is localised as electronic or magnetic charges in servers, cables and personal computers. But it is not only the global that has local ramifications. The local itself is often constructed in the light of the global, as we have seen in the example of Balinese religion, that has been adapted to a (more) global notion of Hinduism as a reaction to outside pressure. Also the "ethno-boom" in Europe during the 1990s, when traditional clothing became fashionable, has to be understood as perceiving the local (traditional shirts and jackets) in the context of the global (fashion).

Robertson (1995), therefore, postulates the use of the expression 'glocalisation'<sup>6</sup> instead of globalisation, because it is more accurate. However, the term did not catch on entirely, although it is used more and more. The phenomenon of local adaptation of global goods,<sup>7</sup> services, ideas, etc. has been described using other concepts, such as "indigenization" (Tomlinson, 2000), "créolisation" (Friedman, 1995), "hybridization" (Nederveen Pieterse, 1995) or "(global) mélange" (Nederveen Pieterse, 1998). While each of these terms stands for a special kind of "mixing", with regard to globalisation they all refer to the local adaptation of things that come from outside the local context. If we look at the discussion about homogenisation, it becomes evident that a universal levelling of cultures, societies and economies is not likely to occur.

### 2.4.4 Universalism versus relativism

If the "homogenisation versus fragmentation" debate revolves around the question of which consequences processes of globalisation have, the "universalism versus relativ-

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<sup>6</sup> "Glocalisation" has its roots in the Japanese word *dochakuka* (deriving from *dochaku*, "living on one's own land"), which originally referred to the agricultural principle of adapting one's farming techniques to local conditions. It was used in marketing, meaning to adapt a product to local conditions (e.g. when marketing a Japanese car in Europe or the USA, where consumers have different needs and desires) (Petrella, 1996).

<sup>7</sup> "No imported object, Coca-Cola included, is completely immune from creolization. Indeed, one finds that Coke is often attributed with meanings and uses within particular cultures that are different from those imagined by the manufacturer. These include that it can smooth wrinkles (Russia), that it can revive a person from the dead (Haiti), and that it can turn copper into silver (Barbados) [...] Coke is also indigenised through being mixed with other drinks, such as rum in the Caribbean to make Cuba Libre or aguadiente [sic] in Bolivia to produce Ponche Negro. Finally it seems that Coke is perceived as a 'native product' in many different places – that is you will often find people who believe the drink originated in their country not in the United States" (Howes, 1996 in Tomlinson, 2000: 84).



ism” discussion is about whether different cultures or societies can be compared or not. If we presume the existence of a plurality of cultures, then we have at least two – and probably many more – possibilities for interpreting any cultural product, namely from the inside and from the outside (Bauman, 1999). Generally we assume that insiders’ interpretations of their own culture is more accurate than outsiders’ interpretations. Therefore, in order to find the “truth” behind a culture, researchers try to get as close as possible to insiders’ interpretations.

The outside researcher’s interpretation is subsequently translated into his/her context of life as well as into the scientific context. With this translation the researcher comes to face a dilemma: if it is to be comprehensible for outsiders, it must be communicated in the language of the outsiders, which may bring about a distortion of the matter in the view of the insider. From a (extreme) universalist perspective, this dilemma is either non-existent or can easily be solved; from the (extreme) relativist perspective, the obstacle is insurmountable. The former supposes that people and hence cultures are essentially the same<sup>8</sup> and that there are only gradual differences between them. The latter starts from the assumption that people from different cultures are essentially different from each other and that, therefore, comparisons are not feasible and translations must always be inaccurate.

Both positions have their disadvantages. *Universalism* tends to ignore differences between cultures and to neglect translation-related problems.<sup>9</sup> *Relativism* tends to ignore the fact that many people with different cultural backgrounds understand each other without any problems and overemphasises assumed incompatibilities. Moreover, the relativistic position is sometimes used (or misused) for political goals, such as when the uniqueness of certain cultural traits or traditions is protected against outside influences.<sup>10</sup> A good example in which the two positions oppose each other, is the question of the implementation of human rights. The UN try to implement and enforce them globally, arguing that they are essentially universal. However, certain states (e.g. China, Malaysia) claim that certain aspects of the declaration of human rights have a Western bias and are not compatible with their respective societies (Bretherton, 1998). In this paper we take universalism and relativism as the two end points of a scale on which we position ourselves somewhere between these extremes, as we think that translations between different societies, cultures, but also people are (increasingly) necessary and should be undertaken with due care. However, in our opinion most of the cultural dif-

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<sup>8</sup>The question of whether the ability to speak and to use language is genetically determined or socially acquired has been discussed since the issue was brought up by Chomsky and Piaget in the 1970s (Piatelli-Palmarini, 2001).

<sup>9</sup>This very paper is an example of the problem: since English has become the lingua franca of science, it is written in English in order to make it accessible to a wide range of people. However, it is not written by native English speakers and thus our thoughts were translated from German into English. Moreover, the paper will probably be read by other non-native English speakers with different cultural backgrounds. Depending on whether one looks at the issue from a universalist or a relativist perspective, this poses more or less of a problem.

<sup>10</sup>Such discussions range from debates about whether or not people should wear some traditional attire when attending religious or public ceremonies to discussions about the imminent extinction of certain ethnic groups.

ferences can be bridged some way or other, even though we presume that there are things that remain untranslatable. Accordingly, translation is an ongoing, unfinished and inconclusive dialogue, because there is no supra-cultural observation point (which would thus be free from any contingency or context) from which the true meaning of cultural messages could be understood (Bauman, 1999).

Within the globalisation discourse there are constant translations, conducted either consciously or unconsciously, which should be borne in mind when dealing with people – and the consequences of their actions – who have a (presumably) different background.

## 3 Theoretical Approaches to Globalisation

Since globalisation is such a wide field and since it is discussed in many scientific disciplines and public spheres, the assessment and interpretation of the processes and consequences of globalisation varies depending on one's respective viewpoint or theoretical background. The following sections will outline three of the most important theoretical approaches of the social sciences and how they deal with globalisation. We are well aware that we both generalise certain fine points of these approaches and omit others altogether (e.g. post-modern approaches to globalisation). First, the concept of 'world society', which is based on system theory, will be presented. Second, globalisation will be outlined as a 'consequence of modernity', as derived from action (and structuration) theory. And third, the concept of 'reflexivity' (which is related to the second concept) will be summarised; this concept emphasises the way in which individuals relate to globalisation.

### 3.1 World society<sup>11</sup>

The concept of 'world society' is based on system theory; it was advocated by Peter Heintz, John Meyer and Niklas Luhmann and originated in the 1960s and 1970s. The concept goes beyond the 'world system theory' by Immanuel Wallerstein (Wallerstein, 1974 [reprinted: 1980, 1989], 1990), which mostly concentrates on economic factors and is criticised for neglecting political and cultural aspects. The concept of world society is based on the idea of all societies in the world being interconnected and forming a world society, which is an emergent phenomenon of the system<sup>12</sup> and as such more than the sum of its parts.

#### 3.1.1 Society is communication

World society does not have an outside reference, because it comprises all communication on the globe: "World society is the coming about of world within communication" (Luhmann, 1997 in Wobbe, 2000: 55). And although all individuals are part of the system and influenced by it, they do not notice it in their everyday lives. As Luhmann points out, this is because (single) communication does not per se have a global scope, but forms global networks, since any communication refers to some other communication and so on. These networks originated with the process of colonisation and have become increasingly widespread and dense. Important milestones included the invention

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<sup>11</sup> Unless specified otherwise, this chapter is based on: Berghaus, 2003; Dürrschmidt, 2002; Wobbe, 2000.

<sup>12</sup> Wallerstein as well as Heintz, Meyer and Luhmann refer to the 'world system' as a result of global communication. While the 'world system theory' refers to Wallerstein's concept, the term 'world system', which extends beyond this concept, is more widely used.

of printing<sup>13</sup> in the 15th century, the increasing velocity of traffic and communication, and the establishment of time zones in the 19th century, as well as the current rapid development of computer sciences. As a result of this development, communication is not bound to a specific location or time. Communication can take place without people meeting face to face at a certain time. Since every single act of communication is embedded in a network of other communication, which is itself embedded in other networks, change can come from different angles and is not primarily bound to the society of a nation state any more.

World society theory is not a normative theory, but rather tries to describe what happens in the world. The world system is a relatively new phenomenon which started after the Second World War;<sup>14</sup> it is highly heterogeneous (its various approaches are heterogeneous, too) and consists of nested layers of (sub-)systems (e.g. international, intra-national, inter-individual).

World society can be described from different angles and viewpoints:

- World society as a *structure of power* and dominance: this operates with the notion of a centre–periphery dichotomy and constructs the world economy analogously to political power relations (Wallerstein in Wobbe, 2000).
- World society as an *international system of stratification*: this focuses on unequal distribution; nations become a part of this stratification.
- World society as a *conglomerate of different cultures*: this emphasises the heterogeneity of cultures in contrast to the notion of a common system of development stages.
- *Combination of the codes of dominance and stratification*: this can lead to an international division of labour, determining differences in the development status of nations and regions.
- World society as a *result of history*: this focuses on the coexistence of actors that form stable units such as nations.
- World society as *global meaningful interaction*: this describes society as the totality of interactions (Luhmann in Wobbe, 2000).

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<sup>13</sup> We are mostly unaware of the fact that we often refer to inventions of the 16th century when we use computer typescript. For instance the body of this text is set in ‘Times Roman’, a font developed by the British typographers Stanley Morison and Victor Lardent in the 1930s, based on van den Keere’s ‘Canon blackletter’ of 1580 (Myfonts, 2003).

<sup>14</sup> The foundation for world society was laid much earlier, in the 19th century, when (Western) societies shifted from a stratified differentiation to a functional differentiation. The former characterised societies with a more or less rigid stratification into lower, middle and upper strata or classes that had little permeability between them. The latter denotes modern societies, which accord greater importance to functions (e.g. politics, business, art, science) and where it is easier for an individual to reach a higher status in an emerging meritocracy (Luhmann, 1984).

### 3.1.2 The development of world society

After 1945 the following developments were important for the emergence of the world system as a single stratification system which shows an increasing number of isomorphisms (similarities of structures):

- The *expectations regarding consumption* spread globally and caused societies to integrate economically.
- *Nation states* with different preconditions show increasing structural similarities and their development progress is measured using the same standards and indicators (e.g. GDP, HDI, etc.).
- The *reorganisation of the international order* – through decolonisation, the establishment of the UN, IMF and World Bank, but also through the participation of women in politics – made the system of nation states more equal and reduced some hierarchies. Meyer points out that national constitutions, while differing from one another in their details, are very similar in their general outlines, which can be interpreted as a sign for the existence of an exogenous system (Meyer in Beyer, 1994; Wobbe, 2000).
- Through the world *educational revolution* – taking place between 1950 and 1970 – national educational systems now conform strongly with each other. It is surprising how similar the individual curricula look (in formal terms).

Especially the last point is interesting, because it does not follow a neo-liberal path in which countries make use of their comparative advantages. Rather, all states have established educational systems that are very similar to one another. Nevertheless, there are great differences between individual nation states or national societies regarding the funds that are allocated to education, which can cause structural tensions and conflicts. The world society theory differentiates between endogenous and exogenous factors that influence a (sub-)system (e.g. a nation state) and examines the question of how such systems cope with them. Regarding nations that have recently become independent, Heintz (cf. Wobbe, 2000) discovered that those countries employ different rationalities to deal with exogenous factors. The socialist way was to internalise the solution of problems, and the capitalist way is to externalise and monetarise issues. Both, he claimed, are not politically rational ways to address external problems. The important thing about that is not that it is crucial to adopt the right approach to dealing with problems, but the fact that the world system does not determine the development of its sub-systems.

A more recent development is the “delegitimisation” of the stratification of the system of nation states<sup>15</sup> that enabled the emergence of new centres of power and prestige differentiation (e.g. TNCs). The reasons for the rise in the TNCs’ power can be found

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<sup>15</sup> This contrasts with the world system theory of Wallerstein, which postulates an increasing stratification within the system of nation states up to the point at which the system breaks down.

within the educational system, that becomes increasingly levelled, as well as in the fact that in industrialised countries a high degree of saturation prevails. In many Western countries – but also in others – the state has ceased to be the prime source of identification; instead, cultural forms that have spread globally (e.g. pop culture, [neo-]liberalism) have gained importance for the formation of people's identity. TNCs produce cultural goods (e.g. “Hollywood”<sup>16</sup>, but also “Nokia” or “Nestlé”<sup>17</sup>) and therefore have some influence on aspects that go to make up people's identity.

According to system theory, world society is an emerging (or autopoietic) system of communication with the globe as its sole outside boundary.<sup>18</sup> Although the borders of nation states have become less important in terms of limiting communication (and society, which is congruent with communication), world society is by no means a homogeneous and unified system. Rather, the communication networks in place can transport all manner of messages and the sub-systems are different from each other.

The greatest strength of the world society theory is also its greatest weakness (seen from the standpoint of action or structuration theory). The system – consisting in communication – is regarded as an emerging phenomenon which individuals relate to when they communicate. Thus the system can be perceived as a phenomenon that is outside the individual actor and that can only partly be controlled. This notion is concurrent with many people's perception of globalisation as something that just happens and that rapidly changes people's living conditions. However, critics (for example Giddens, 1995; Werlen, 1995) point out that systems do not exist outside individuals and that there is no such thing as a world society that has somehow emerged and is sustained by itself. They emphasise that globalisation is a result of the intended and unintended consequences of individual actions and decisions and thus clearly a direct effect of what people do.

### 3.2 Global modernity<sup>19</sup>

While modernity plays an important role in system theory, globalisation is not explicitly tied to the emergence of world society, rather world society is seen as a coincidental result of developments connected to modernity. Some globalisation theorists emphasise the significance of modernity to a far greater extent. In the following sections, the concept of globalisation as a consequence of modernity will be outlined.

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<sup>16</sup> Although India and the Philippines produce more movies than the USA, the films from Hollywood are distributed more widely and generate far higher revenues than films from other countries (Le Monde Diplomatique, 2003).

<sup>17</sup> Nokia primarily produces mobile phones, but promotes and sells a certain lifestyle that spreads with the product. The same applies to many of the food products made by Nestlé.

<sup>18</sup> To be precise, the space around the earth as well as the moon (though only during a few years in the 20th century) have to be included, because communication has already gone beyond the surface of the earth.

<sup>19</sup> Unless specified otherwise, this chapter is based on: Albrow, 1998; Backhaus, 1999; Giddens, 1996; Robertson, 1992; Tomlinson, 2000.

### 3.2.1 A brief history of globalisation

There is no consensus about the beginning either of globalisation or of modernity. Depending on how modernity is defined, its beginning can be dated to some time between the early 16th (focus on the emergence of capitalist modernity as a response to the ‘crisis in feudalism’) and the mid-19th century (focus on democracy and nation building as well as on industrialisation). Therefore, periodisation becomes a pragmatic issue in that plausible historical lines have to be drawn that separate processes that are relevant for us from those that are not. Giddens argues that “[t]he modern world is born out of discontinuity with what went before rather than continuity with it” (Giddens in Tomlinson, 2000: 36). According to him, modernity is a distinct period rather than the continuation of an evolutionary process of history as, for example, Elias (1977) saw it.

Of course, modernity should not be perceived as entirely disconnected from previous developments because there are plenty of cultural ‘survivals’ in modern societies. However, the kind of connectivity that has developed since the 17th century was not present before, even though there had been huge empires (e.g. the ones of the Chinese, the Persians, Alexander the Great, the Romans, Charlemagne or Ghengis Khan). Neither did they have the capacity for cultural and political integration over large distances, nor the techniques for routine monitoring and surveillance of political-territorial borders that modern nation states have. The shift that occurred between pre-modern and modern societies does not concern the introduction of mobility, technology and connectivity, because these things had existed in pre-modern societies too. It is rather an axial shift towards a complex connectivity that overcomes (at least partly) cultural distance through routine integration into daily local life by means of education, employment, consumer culture and mass media.

Robertson (1992) formulated five stages – a “minimal phase model”, as he calls it – of the development of globalisation, which are characterised by specific events or processes:

1. The *germinal phase* (early 15th until mid-18th century in Europe) started with the expanding scope of the Catholic church, the spread of the Gregorian calendar, the emergence of the heliocentric world view, the accentuation of the individual and ideas of humanity. Slowly national communities developed, especially after the Treaty of Westphalia in 1648, when it was agreed to acknowledge nation states and not the (Catholic) church as the supreme and sovereign rulers over given territories.
2. The *incipient phase* (mid-18th century until 1870s, mostly in Europe) saw a sharp shift towards the idea of a homogenous, unitary state. Consequently, formalised international relations were developed and a more concrete conception of humankind emerged. Discussions about nationalism and inter-nationalism started.
3. The *take-off phase* (1870s until mid-1920s) was characterised by the convergence of the four reference points of national societies: generic individuals (with a masculine bias), a single international society, a system of national societies and a singular (but not unified) conception of human-

kind. Connected with this development were discussions about national and personal identities. Towards the end of this phase, immigration restrictions became globalised and the speed of global communication increased considerably. Finally, the first global competitions – e.g. Olympic Games, Nobel prizes – were conducted and the war from 1914 to 1918 was considered as the First World War.

4. The *struggle-for-hegemony phase* (mid-1920s until late 1960s) was dominated by conflicts (e.g. the Second World War, the Cold War, colonised societies' struggling for independence) about the form of modernisation and consequently of globalisation. The holocaust and the use of the atomic bomb sharply brought the threats to humanity into focus and eventually triggered the discussion on universal human rights. The establishment first of the League of Nations and then of the United Nations was a step towards a global humanity. The crystallisation of the Third World<sup>20</sup> and the recognition of former colonies' national independence marked a milestone on the road of establishing a system of emancipated nation states.
5. The *uncertainty phase* (late 1960s until early 1990s) was marked by the moon landing and rapid acceleration of global communication but also by rising awareness of global pollution. The end of the Cold War left capitalism as the only viable economic mode and ended global bipolarity. The concept of individuality became more complex due to the inclusion of gender, sexual, ethnic and racial considerations. Global institutions and movements greatly increased, as did the number of TNCs and non-governmental organisations (NGOs). The media system was consolidated and globalised, and Islam became the most prominent force of counter- or antiglobalisation. At the same time Muslim circles initiated an (Islamic) reglobalisation, vastly expanding the directions in which globalisation might develop.
6. The years from 1990 until now could either be added to the uncertainty phase or seen as a *consolidation phase*, with the principles of neo-liberalism and of democracy being adapted by a growing number of societies. Moreover, the dominance of the USA as a hegemonic power became more visible, but was also increasingly disputed. It should not be forgotten, either, that the disparities between rich and poor (countries as well as individuals) increased, even though the poor were also able to raise their income.

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<sup>20</sup>The term 'Third World' was coined at the 1955 conference of Non-Aligned Nations in Bandung (Indonesia) and was intended to emphasise the existence of a third power apart from the two existing big power blocks. The deprecatory connotation developed later (Nohlen & Nuscheler, 1994).



### 3.2.2 Globalisation as a consequence of modernity

As we have seen, globalisation is – according to many theorists – closely connected to modernity, which is widely regarded as a distinct epoch with disjunctive connections to the pre-modern area. As Giddens, probably the most prominent and fervent advocate of the connection of globalisation and modernity, says: “Globalisation concerns the intersection of presence and absence, the interlacing of social events and social relations ‘at distance’ with local contextualities. We should grasp the global spread of modernity in terms of an ongoing relation between distanciation and the chronic mutability of local circumstances and local engagements” (Giddens, 1991 in Tomlinson, 2000: 47).

Therefore, modernity as *time–space transformation* facilitated the development of globalisation. The invention and mass distribution of the mechanical clock<sup>21</sup> severed the ties between time and place. Before that, it had been almost impossible to tell the time outside the context of a specific locality. For example, the expressions ‘at dawn’, ‘at dusk’ or ‘at noon’ are tied to a given place. As measurements of time, they only make sense to people living in the same local context. Thus, the uniform and abstract nature of clocked time freed the co-ordination of social activity from the particularities of place. For example, the term ‘person-hours’ can be used anywhere in order to measure how much time is needed to perform a specific task. Of course there are (local) differences in productivity, but that is not the point. Rather, the unit serves as a (globally) transferable mode to measure work. The introduction of Greenwich Mean Time (GMT) in Britain in 1880 and its subsequent adoption as a point of reference for the world time zones in 1884 signified the irreversible destruction of all other temporal regimes in the world.<sup>22</sup> However, the invention of the clock did not determine modernity. It rather facilitated changes in everyday life without which the watch would not have gathered such importance.

The ‘emptying of time’ had implications for the ‘emptying of space’, in which space was separated from place. Place or locale can be described as the physical setting of some interaction (e.g. a room in a house, a street corner in a town, a field in a rural area, but also territories of nation states). Space is an abstract concept of the relation of objects and distances.<sup>23</sup> Modernity fosters relations at a distance which are no longer based on face-to-face presence (the mode of interaction of a majority of people in pre-modern times) in a given locale. A middle-class family house is still a locale, but it is also the setting for distanciated interaction. Communication technologies (e.g. a letter box to receive mail and newspapers, TV, telephone, internet), connect it to the entire world, the electricity network connects it to expert systems which maintain these technologies, and the way in which a house is owned (e.g. via loans or mortgages) connects

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<sup>21</sup> Although there had been mechanical clocks since medieval times, their mass distribution only occurred between 1800 and 1850. Before that, the significance of clocks and watches, as well as their reliability, was rather limited.

<sup>22</sup> Whereas years are not calculated the same way (for example, the Balinese calendar shows seven different systems: Western, Arab, Jawa, Çaka, Chinese, Ichi Gatsu, Buddhist), the measurement of days, hours, minutes and seconds has been globalised.

<sup>23</sup> For a discussion of the definition of ‘space’ see: Glückler, 1998; Lossau, 2002; Werlen, 1995.

it to the global system of finance. Thus, social activity is *disembedded* from contexts of co-presence, which means that other persons can be reached or influenced over large distances; they do not have to be physically present in order to perceive the consequences of someone's actions. This disembedding lifts social relations from their embeddedness in locales via two mechanisms: 'symbolic tokens' and 'expert systems'. *Symbolic tokens* are media of exchange with a standardised value, they are interchangeable across a plurality of contexts (Giddens, 1996). The most prominent token is money and its most globalised form is the credit card, that is not even tied to a specific currency. *Expert systems* provide (technical) knowledge that is valid independent of the people who make use of them. We are increasingly dependent on such expert systems in which we have to put our trust. If we drive a car, for example, we trust the experts who engineered it that it works properly and we trust the traffic planners that the traffic rules work not just in the place we live. Expert systems are relevant to almost every aspect of social life and the requirement to trust them is also a disembedding force that promotes globalisation.

According to the observations above, modernity and consequently globalisation are Western phenomena that spread over the globe and that have a distinct Western bias. Indeed, many of the aspects which we associate with globalisation are of Western origin. However, there are also critics (for example Nederveen Pieterse, 1995; Said, 1994) who emphasise that while there is a prominent and powerful Western modernity, this co-exists with other modernities that are interconnected with it but not identical. We will not further discuss this issue, because African or Asian modernities are similar to Western modernity in many aspects, but also because the discourse on globalisation – also in non-Western societies – focuses on aspects related to modernity in general, including Western modernity.

In contrast to world society theory, the concept of globalisation as a consequence of modernity puts actions of people at its centre. *They* shape the social system, which is the precondition for further actions: it is not the system that shapes or even determines people's actions. In the next chapter, the active involvement of individuals in the process of globalisation will be looked at more closely.

### 3.3 Reflexivity, or how we participate in globalisation

As we have seen above, "modernity" is by no means regarded as an adequate term to describe the time we live in. Expressions such as 'post-modernity', 'second modernity', 'late modernity', 'liquid modernity', 'cyber-modernity' or 'reflexive modernity' are being discussed, often heatedly. We do not want to delve into that discussion, which at times seems to be rather academic; however, we want to bring up the concept of *reflexivity*, which is, in our opinion, essential, in order to grasp some important consequences of globalisation and to avoid misunderstandings.

### 3.3.1 Reflexivity and reflex

According to Habermas (1998), reflexivity can mean two things: first, the application of systemic mechanisms to the system itself (*reflex*), e.g. coping with ecological problems resulting from economic activities using other economic activities;<sup>24</sup> and second, self-reflection as self-perception and self-influencing of collective actors, e.g. changing the conditions of global markets through political influence.<sup>25</sup>

The first meaning refers to the fact that modernity – mostly due to technology and production – has negative consequences or side-effects which are dealt with using the technology of modernity. The so-called ‘millennium bug’ or ‘Y2K problem’ originated in the computer industry in the 1980s, when memory space was limited and programmers saved “space” by limiting the year fields to two digits, which was later thought to lead to system crashes when the date fields would change from ‘99’ to ‘00’. Towards the end of the 1990s, the same companies (if not the same programmers) who had caused the problem fixed it using basically the same technology (and more memory space). The millennium bug is a good example for the reflex of modernity, its bending towards itself. Especially in the discussion about environmental problems caused by the use of modern technology, this reflex becomes important, because modern technology involves great risks, which is why our society is also called risk society (Beck, 1986).

The second meaning refers to the more individual aspect of assessing situations and choosing the “right” thing to do. Self-reflection is crucial to the theory of structuration (Giddens, 1995). It is not simply a mode of reaction to the consequences of one’s own or other people’s actions, it is an assessment of the context of these consequences and encompasses the choice of different possibilities to (re)act.

Smart (1999) calls the era of modernity in which people were not aware of the negative environmental consequences of modern technology, ‘simple modernity’. In simple modernity, people wanted to control the uncertainties of life – initially, the goal was (and still is) to eliminate the dearth of food – by means of (technological) progress. Simple modernity thus combined two kinds of optimism: first, the notion of *linear scientification* presupposes that the more we know about the world, the more we can control it; and second, the notion that *side-effects* of modernisation (cf. reflex) and progress can be overcome with better technology (if not now, then in the future). Historical experience – e.g. with regard to environmental pollution – however, tells us that such optimism is not justified. We have made the experience that side-effects of modern technology cannot be entirely checked and eliminated by using improved technology (as in the case of the millennium bug). Therefore, we increasingly have to deal with human-made risks that have a high potential of imminence and that spread globally (e.g. climate change, depletion of the ozone layer, pollution of the sea, etc.). A great deal of damage thus loses its spacial and temporal limitations and often cannot be ascribed to

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<sup>24</sup> For example the (paid) clean-up of beaches after an oil leakage from a freight ship.

<sup>25</sup> For example the protection of the agricultural sector of a country from cheap imports or the boycott of goods that were manufactured with child labour.

distinct polluters, because many actors contribute a little to the problem (e.g. in the case of global warming).

### 3.3.2 Risk society and reflexive modernity

In principle, individuals can deal with risks in two ways: in a fatalistic or in a self-reflexive way. Fatalism is the easier option since no change of behaviour is required. Although we cannot state that system theory (or the theory of world society) gives rise to fatalism, we could say that it can favour this kind of behaviour. This is because, if the system of a society is regarded as an outside phenomenon (i.e. outside the influence and control of what people do in their everyday lives), people regard their ability to change or alter it as marginal. A (self-)reflexive reaction, which is more in line with action or structuration theory, is more demanding. According to the theory of reflexive modernity, individuals have to decide whose expertise they want to believe in, because expert systems are no longer regarded as being reliable *per se* in that expert opinions can differ from each other.

Regarding global warming, (reflexive) people have to decide whether they believe the experts who claim that the problem is human-made and that it can be (partly) solved by reducing CO<sub>2</sub> output, or whether they believe those who say it is caused by the increased occurrence of sunspots or other natural factors. If they believe the former, people should reflect on their own role in producing CO<sub>2</sub> and whether they can and want to do anything about its reduction. Since it is often difficult to know exactly what consequences one's actions will have (because some of the consequences are spatially and temporally distanced), reflecting upon them is not always easy. And since so many of people's actions have consequences in far-away places, reflection can become a burden and can be perceived as tyranny. Nevertheless, (positive) changes only happen if people reflect on their behaviour and act accordingly. Therefore, the members of a research team that sets out to mitigate syndromes of global change, should reflect on their use of airplanes if they believe the experts who maintain that planes are among the greatest producers of CO<sub>2</sub>. The Western consumers of coffee should reflect on whether the coffee growers in India or Ethiopia get an adequate share of the price of a cup of java. And the rubber producers in Malaysia should reflect on their role in the global rubber market (and thus its price structure), if they decide to increase the acreage of their plantations. Although reflection alone does not change anything yet, it is the first step – and *conditio sine qua non* – towards conscious action in the direction of change.

In order to be able to reflect, people need information about an issue. Knowledge is broadly available but not equally accessible to all people. Certain topics such as 'global warming' have entered the public discourse and can be regarded as common knowledge (though not in their details and all their consequences). Others – e.g. the relation of an increase in the demand of low-fat products in Europe and the USA with the income of Balinese seaweed farmers (Backhaus, 1998), or the impact of the decreasing number of cars sold on prices of raw rubber – are only known to few (interested) groups of people.

## 4 Examples from Debates on Globalisation in India

The debate about globalisation is taking place in virtually every country. Therefore, we can talk about a globalised discourse. However, the discourse threads do not have the same “thickness” in every country, which means that certain topics are discussed more than others and that the discourse threads are embedded in a mesh of other local discourses that are specific and not globally harmonised. Below, examples from the Indian discourse are taken in order to have a brief look at a debate conducted in the South. Of course this is not the place to outline the whole discourse, and the chosen examples should not be regarded as representative for the Indian discourse. In the following chapters, we mostly draw on an overview of the globalisation discourse by Gail Omvedt (2000) and use examples from the media discourse to illustrate some individual positions.

In India the public discourse on globalisation started with the introduction of a “new economic policy” by the Narashima Rao government in 1991, which allowed for a certain liberalisation of the economy. The debates since then have taken place in different fora: in newspapers and magazines, in electronic media, and at public events such as seminars or demonstrations. The term ‘globalisation’ was increasingly used for political purposes and was connoted either positively or negatively (Omvedt, 2000: 175-178). Below, some impressions of the globalisation discourse as seen by outsiders will be presented. We are well aware that we take up a specific position and that there are other viewpoints as well. Moreover, we do not attempt to represent and analyse the whole discourse in its totality. Rather, the most prominent positions were chosen.

### 4.1 In favour of globalisation

While supporters as well as opponents of globalisation agree that the process was somewhat forced upon India from the outside, they fervently disagree on its consequences. The supporters envisage globalisation as a force that helps to unleash the potential of “India the caged tiger” that was shackled by the “Nehru model” of development. Jawaharlal Nehru, they claim, created a command economy which proved to be unviable. The term ‘*licence raj*’ stands for the disadvantages of this model. It describes the fact that every entrepreneur, from rich capitalists to small-scale farmers, has to go through a bureaucratic maze in order to get the *permission* for productive work. Thus, the main argument in favour of globalisation is that if all these restrictions are removed, the Indian economy will be able to face global competition and to make a leap forward. Indeed, when a number of barriers were removed in 1995, many businesspeople got into a state of euphoria. Later, as it became apparent that not all enterprises benefited from the change – especially those who used the *licence raj* to establish and defend certain monopolies – it was argued that foreign companies had an advantage in India over domestic businesses. The consequence of this development was that among the supporters of globalisation the term ‘negotiated globalisation’ was coined, which means that the nation state should keep a certain level of control on developments and should not open the country entirely to unregulated capitalism (Omvedt, 2000: 185-189).

#### 4.1.1 Example of support for globalisation

Manu Shroff (1999) can be regarded as a strong supporter of globalisation in India. He perceives it as “a process of moving away from something that is less desirable to a goal which is more satisfactory” (Shroff 1999, Perspectives). For him globalisation is strictly an economic process that has its roots in the time after the Second World War, when efforts were made to establish an international economic order guarded by the IMF, World Bank and the General Agreement on Tariffs and Trade (GATT). He makes a distinction between international and global economic order. The former is largely governed by nation states, whereas the latter is sustained by global institutions. The collapse of the Soviet Union, technological change and the information revolution contributed to a progressive integration of the world economy in the 1990s. While Shroff regards technology as a prime driver of this development, he sees the freedom of markets as the most important motor of globalisation and considers both to be much more important than any conscious decisions taken by governments. He consequently regards globalisation as a force in its own right which is difficult to regulate and control. The scope of globalisation, however, is still limited to the markets for products and some services, whereas state interventions prevent the labour market from becoming globalised. These interventions – usually in the form of immigration restrictions – mostly represent rich countries’ attempts to preserve their standard of living. Hence, Shroff – using some arguments of dependency theory – accuses the Western countries of inhibiting the process of globalisation.

India is already benefiting from a decade of liberalisation, says Shroff, for as competition expands, efficiency gains increase. This has led to corporate growth, modernisation and higher consumer satisfaction. He counters the arguments of the so-called Bombay group, which complains about the rising influence of multinationals in India, by remarking that once a foreign company has gained entry to the Indian market, it is no longer foreign. However, he also concedes that due to Indian fiscal policy, domestic enterprises face disadvantages that ought to be eliminated. In order to make globalisation beneficial for Indian enterprises, the government should not take any measures to hinder the free flow of foreign direct investments, but it must give “breathing space” to the domestic industry. Shroff also admits that globalisation has some negative effects but he relativises them with the following comparison: “it is true that when one opens the window one gets fresh air as well as insects and [sic] mosquitoes. The answer is not to shut the window, but maybe to put a screen or install an insect repellent” (Shroff 1999: p. 2848). At the national level, such a screen should be introduced in order to alleviate poverty – something India has grappled with since independence. While Shroff cautions against overly optimistic ideas by stating that we have to live with a certain degree of inequality, he also says that without growth poverty cannot be alleviated and that without a certain degree of literacy no economy has been able to attain sustained high growth. Hence, he expects the government to invest in literacy programmes while giving enterprises a wider berth for their activities. Regarding the (unequal) global distribution of income, he accuses the rich countries of blocking the free flow of capital and labour (with protectionist laws and by subsidising certain sectors of their own economies), which would enable poor countries to balance inequalities. For the future

Shroff envisages a shift from internationalism, based on government policies, to globalisation which should result in a global order in which nation states “do not negotiate with each other with a perspective of maximising national gains and yielding the minimum of their freedom of action” (Shroff 199, p. 2849).

Shroff’s statements, however, did not remain unchallenged for long, even by people who essentially share the idea that globalisation is primarily taking place in the economic realm and that India can mostly benefit from it. Kurien (1999), directly responding to Shroff’s article, states that economic activities do not exclusively take place on the national or international macro-level but also on the level of the household. Therefore, ‘impersonal forces’ operating in the market are a myth accepted and propagated – according to Kurien – by many economists. In contrast, he says, “the market is only the *institution* that facilitates the act of exchange” (emphasis in the original) and can therefore not be impersonal. And drawing on this argument, Kurien asks why the interferences of governments should be more harmful for markets than covert manipulations by other units (e.g. TNCs). Nevertheless, he agrees with Shroff that such interferences with the market are detrimental to globalisation and the economic development and well-being of people in India.

## 4.2 Against globalisation

As probably in most countries, there are many in India who distrust globalisation or openly accuse it of causing harm to the domestic economy and to the majority of the population. These opponents of globalisation (or of the developments, respectively, they associate with it) have different reasons and motivations for their stance. Most, but not all, claim that *outside pressure* from global institutions such as WTO, IMF or World Bank but also from TNCs causes the social shield that India has erected to break down, leaving vulnerable parts of the society unprotected. The economist Ashok Mitra (1998 in Omvedt, 2000: 180) calls globalisation a tool of neo-colonialism with the aim of keeping developing countries in their current state of (under)development. In his view, structural adjustment programmes (SAPs) are a tool used by the World Bank to achieve this goal. These arguments are in line with concepts of the dependency theory, that was developed in the early 1970s. The situation today is different in that it is not only industrialised nation states that are said to keep developing countries in an underdeveloped state causing instability and poverty, but also the aforementioned global institutions.

A consequence of this outside pressure is seen in the *downfall of the nation* state, that brought and guaranteed freedom after independence and now ceases to protect its citizens from external constraints. Vandana Shiva (2001) claims that the sudden withdrawal of the state (that has the constitutional duty to feed people) leads to starvation again, as it happened in Bengal and Orissa in 1942 and as it is starting to happen in many places in Orissa, Madhya Pradesh, Maharashtra, Gujarat and Andhra Pradesh today. Complying with the WTO’s demands to liberalise the Indian economy, the Indian state cut its subsidies for farmers. The farmers’ production costs increased and caused food prices to rise. Consequently, the food allowances declined for many people and vulner-

ability (see Sen, 1981, 1993) to starvation generally increased. Moreover, the government encouraged export production, which caused peasants to shift from growing staples to producing cash crops (e.g. coffee, rubber, copra, shrimp<sup>26</sup>) for the international market. Accordingly, the production of staples declined and their prices increased. And because import restrictions had been removed, subsidised cheap foreign staples were imported with which the local peasants were unable to compete.<sup>27</sup> According to Shiva and others, the global market, which is dominated by TNCs and WTO rules, drives the Indian agricultural sector into a downward spiral from which it cannot recover quickly.

Besides economic reasons, Indian “anti-globalists” bring up *cultural aspects* of globalisation which they find problematic. There is the overall fear of a general homogenisation of culture towards a “McDonaldised” individualistic, commercial and capitalist competition culture which is detrimental to Indian tradition. Within this discourse, there are two noteworthy religious-political threads: the position of the *Hindu nationalists* and the *Dalit perspective* (Omvedt, 2000: 183-195). The Hindu nationalists fear a cultural deterioration through the liberal views of sexual behaviour and gender relations that come to Indian households via Western TV broadcasts, which they consider to be as dangerous for Hindu tradition as Islam. With regard to the economy, they invoke *swadesh*, which means “from the own country” and was the theme of the Indian anti-colonialism movement at the beginning of the 20th century. India should, therefore, concentrate on its own forces and further internal liberalisation (removal of bureaucratic obstacles, production zones, etc.), but only allow *selective* external liberalisation in order to protect domestic production (Omvedt, 2000: 180).

The Dalit<sup>28</sup> movement proposes the very opposite (according to Omvedt, 2000). Dalits want external liberalisation, but only selective internal liberalisation. The reason against full internal liberalisation is their fear that quotas for Dalits in the educational system and in the government will be abolished and that they will be discriminated against to an even greater extent than before. Their support of the WTO position of external liberalisation can also be regarded as politically motivated. They argue that those who work in a liberalised economy (e.g. the Dalits) benefit, whereas those who do not work (e.g. the Brahmins, who profit from the caste system) will lose.

There are various reasons for people and groups to be against what they perceive as globalisation, but the most prominent ones concern the agricultural sector as well as cultural phenomena.

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<sup>26</sup> The aquaculture of shrimp also has alarming consequences for the environment of coastal areas (Ajiki et al., 1996; Backhaus, 1997, 1998).

<sup>27</sup> These arguments are countered by advocates of liberalisation (see for example Joshi in Omvedt, 2000: 190). They claim that the nation state exploited the Indian agricultural sector by means of trade restrictions, zonal cultivation restrictions and export bans, thus stifling any efforts to be competitive. Joshi, therefore, argues that liberalisation will help the Indian agricultural sector to blossom and even save the Indian economy.

<sup>28</sup> In the Indian caste system, Dalits are the untouchables. The Dalit movement fights against the discrimination of the Dalits in Indian society.



### 4.3 Intermediate positions

Not all people and groups take a clear position in favour of or against globalisation; there are also intermediate positions that want to enjoy the advantages of the process without giving all up to liberalisation, and hence opt for “adjusted globalisation”. Nobel price laureate Amartya Sen is probably the most prominent advocate of this position. He thinks that globalisation is essentially a good force and that, if it is supported adequately by national policies (e.g. with investments into the health and educational sectors as well as with a land reform), it will be beneficial for India. According to this position, politics should not retreat and leave all to market forces, but likewise not everything that is associated with globalisation and liberalisation should be rejected.

### 4.4 The Indian debate in the light of scientific discourse

If we look at the arguments of supporters and opponents of globalisation regarding the theoretical aspects outlined in the first chapters (see Table 1 as a reminder), we get the following picture. Shroff, but also Kurien emphasise the importance of the economy and of markets (and market strategies) that have to be regulated in a new, liberal way. Thus, they touch upon categories 1, 2 and 4 of the Group of Lisbon. Moreover, Shroff regards technology (category 3) as the prime driver of globalisation. The position of the supporters of globalisation within the discourse is clearly on the side of optimism. While they acknowledge negative aspects, they do not attribute them to globalisation but to fragmenting forces such as interferences of nation states. Therefore, they also perceive the homogenising consequences of globalisation as positive. The “universalism versus relativism” debate remains almost untouched, except for Shroff’s statement that foreign companies that invest and operate in India are no longer foreign.

While he acknowledges a certain difference between foreign and local companies, he does not perceive it as an insurmountable obstacle – on the contrary: “foreign” becomes quite quickly local. Regarding the global–local discourse thread, Shroff remains conspicuously on the global macro-level of markets and political structures; this is in line with system theory, which is more concerned with structures than with individual communication. Although Shroff does not mention world system theory, the form of his arguments – but not necessarily their contents – fits it well. Here, Kurien diverges from Shroff when he points out that economic activities do not exclusively take place on the macro-level and that they as well as markets are not impersonal forces, but institutions or rules made by people and used by people. While he agrees with Shroff’s optimistic view of globalisation, Kurien does not share his theoretical, structural or systemic view. Rather he sees the individual actor at the centre of the globalisation processes; this is in line with action theory or structuration theory, which regards globalisation as a consequence of modernity.

**Table 1:** Categories of globalisation according to the Group of Lisbon

	Categories	Issues
	1. Globalisation of finance and capital holdings	<ul style="list-style-type: none"> <li>• transactions on the capital market</li> <li>• direct foreign investments</li> <li>• mergers and acquisitions</li> <li>• growth of TNCs</li> </ul>
	2. Globalisation of markets and market strategies	<ul style="list-style-type: none"> <li>• standardisation of production and procedures</li> <li>• outsourcing of parts of production</li> <li>• greater flexibility of production</li> <li>• increasing job insecurity</li> </ul>
	3. Globalisation of technology, knowledge and research	<ul style="list-style-type: none"> <li>• information is better available</li> <li>• increasing competitiveness</li> <li>• quicker changes</li> </ul>
	4. New possibilities of regulation and steering political and economic processes	<ul style="list-style-type: none"> <li>• increasing power of TNCs</li> <li>• decreasing influence of nation states</li> <li>• proliferation of neo-liberalism</li> <li>• increasing importance of supranational organisations (WTO, UN, World Bank, IMF, etc.)</li> </ul>
	5. Political coalescence of the world	<ul style="list-style-type: none"> <li>• increasing regional and international integration (e.g. UN, EU)</li> </ul>
	6. Consumer behaviour and lifestyles	<ul style="list-style-type: none"> <li>• cultural messages are spreading</li> <li>• increasing importance and power of media</li> <li>• lifestyles are not based locally any more</li> </ul>
	7. Globalisation of perception and consciousness	<ul style="list-style-type: none"> <li>• perceptions of a homogenising world</li> <li>• fragmentations as opposition to universalisation</li> </ul>

Those who argue against globalisation also mention markets and market strategies (category 2) as important processes. However, the same importance is attributed to the political coalescence of the world (category 5), which is regarded as causing nation states to withdraw from regulating markets (category 4), and to cultural aspects, referring to changing perceptions and consciousness (category 7), which the supporters of globalisation do not mention. Moreover, critics focus on individuals or groups of individuals and on local perspectives. They perceive globalisation as a homogenisation process threatening culture and local production. However, it is interesting to note that the Hindu nationalists and the Dalits use both homogenising (e.g. abolishment of bureaucratic obstacles to Indian enterprises) and fragmenting arguments (e.g. invocation of swadesh) to back their proposals for India's future (i.e. liberalisation of domestic market and selective liberalisation of international market forces in India, and vice versa). It is not clear whether their views are based on world society or action theory. There may be a tendency towards the latter, because they do not accuse the government per se, but certain decision makers, even if they are not explicitly named.

## 5 Conclusion

All the examples that were used to depict (some aspects of) the Indian discourse equated economic liberalisation with globalisation. Other categories are mentioned as well, but they seem to be of lesser importance. Global and local aspects are always seen as opposing each other, e.g. the global is either seen as freeing the local from bureaucratic restrictions or as constraining and streamlining it with Western liberal concepts. Likewise, homogenisation is regarded as the opposite of fragmentation, which is either seen as the only way to prosperity or as a threat to the particular and traditional. The “universalism versus relativism” debate is hardly mentioned. System theory as well as action theory are used by both parties; accordingly, we cannot attribute one theory to the supporters and the other to the sceptics of globalisation. However, none of the texts analysed displayed much reflexivity. The influence of one group or organisation is mostly seen in a one-dimensional way and regarded as either positive or negative. The more recent trends, too, advocate using the positive processes of globalisation and avoiding the negative ones. It is not mentioned that one process can have different consequences, not all of which are necessarily intended.

This paper first gave a short overview of the dimensions and categories which are influenced by globalisation. Second, globalisation was presented as a discourse which is not aimed at one single goal, but which is very diverse and also has threads that oppose each other, and which therefore cannot solely be seen as a unifying or homogenising force. Third, the juxtaposition of system theory and structuration theory, both of which form world society, showed that we can look at the globalisation discourse with different theoretical concepts, which influences our perception of the consequences of globalisation processes. Fourth, examples of some Indian discourse threads were given, which demonstrated that globalisation is mostly regarded as an outside force and that opinions about whether or not it is beneficial to India diverge considerably.

Fifth and last, this paper aims at heightening readers’ awareness regarding their own actions and those of others. Since we are all part of the globalisation process, we all contribute to it in some way or other; mostly it is the unintended consequences of our (everyday) actions that have consequences – either as constraints or as options – for people who live spatially and temporally distanced from us. In our view, reflexivity is the most fruitful way to look at globalisation because it allows an accurate analysis of actions that lead to specific outcomes.



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Globalisation is often regarded as something that comes from the outside and that is mostly driven by economic factors. This paper argues that globalisation is more than just that: it has much to do with everybody's daily lives and is shaped by everyday actions. Globalisation is not simply a topical concept: it has become a discourse that is shaped by different and sometimes conflicting threads: optimism versus pessimism, homogenisation versus fragmentation, the global versus the local, or universalism versus relativism.

There are also different theories that try to grasp the discourse. Three of them – world society, global modernity and reflexivity – are briefly described in the present publication. As an example of the globalisation discourse in the South, the debate in India is analysed and considered in light of the theoretical approaches presented before.

The NCCR North–South Dialogue Series presents reflections on research topics of concern to programme members throughout the world.

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