GLOBALIZATION PAST, PRESENT, FUTURE

Edited by Manfred B. Steger, Roland Benedikter, Harald Pechlaner, and Ingrid Kofler

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Globalization

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Introduction

Manfred B. Steger, Roland Benedikter, Harald Pechlaner, and Ingrid Kofler

Since the end of the Cold War, globalization—the intensification of worldwide interconnectivity, mobility, and imagination—has been reshaping our planet. The latest phase in this long historical process reaching back millennia started in the 1990s, when the Keynesian model of international economic order forged at the 1944 Bretton Woods Conference was replaced by a neoliberal globalization system. Packaged by power elites in the Global North as a credo in the providential workings of globally integrating markets, the ascendant paradigm broadened its ideological appeal through influential media corporations. They saturated the world with benign digital images and memes of a shrinking planet powered by growing consumption, computers, and the Internet. Billions of ordinary people succumbed to this market globalist utopia, thinking that they, too, would reap the benefits of growing economic interconnectedness in the not-too-distant future.

However, following the worldwide wave of anti–free trade protests starting with the 1999 “Battle of Seattle,” a new global vision of social justice drew attention to the widening gap between the globalist promise and widening social inequality. The 9/11 attacks and the so-called “global war on terror” added significantly to these unexpected globalization hiccups at both the material and ideational levels. Enter the 2008 Global Financial Crisis that triggered the Great Recession and the Eurozone Sovereign Debt Crisis. These epic economic meltdowns of global proportions not only shattered the general confidence in the worldwide integration of finance, trade, and political structures, but also effected a profound shift in the public mood away from market globalism. As a result, the neoliberal globalization system was losing its luster in the Global North while the new middle classes in the Global South continued to benefit from their advantageous position of low-wage producers in the global economy.

The threats to the waning neoliberal globalization paradigm grew even more intense during the 2010s and early 2020s. First, national-populist forces capitalized on the rising perception that deregulated markets were playing an increasingly negative role. Globalization became *the* political punching bag for resurgent nationalisms around the world. Promising a return to national control, populists like Donald Trump, Viktor Orbán, and Jair Bolsonaro issued emotional promises of making their countries "great again." Their denunciation of neoliberal globalization notwithstanding, national-populists became themselves part of globalization as they constructed transnational networks of antiglobalists. Their growing political power—and the crucial role played by the proliferating social media in shaping public opinion in cyberspace—was reflected most spectacularly in the stunning electoral triumphs of Trumpism in the United States and Brexit in the United Kingdom, as well as in the electoral successes of European national-populist parties.

Second, starting in 2020, the COVID-19 pandemic cast a ghastly shadow over the lives of the 7.8 billion inhabitants of this planet. By 2022, 550 million people had contracted the disease, resulting in 6.5 million confirmed deaths. Global interdependencies and mobilities of various kinds ran up against major pandemic-related obstacles caused by repeated national lockdowns, severe travel restrictions, extended travel quarantines, strict social distancing rules, and a noticeable shift to working from home. For academic analysts, the coronavirus crisis proved to be an extremely challenging research subject since it required an understanding of how the complex impacts of various domains of globalization had been impacted by the virus.

Third, Great Power competition was heating up as China, India, and Russia increasingly challenged U.S. world leadership on multiple fronts. The Russian annexation of the Crimean Peninsula in 2014 and China's offensive posture in the South China Sea, plus its antidemocratic crackdown on Hong Kong, marked a new era of geopolitical conflict. Building tensions came to a head in 2022 with Russia's full-blown invasion of Ukraine and the subsequent leveling of unprecedented international sanctions devised by a broad coalition of countries led by the United States against the Russian aggressor. For the first time since the end of the Cold War, the protracted Ukraine War raised the specter of a global nuclear war. To make things worse, resurgent nationalism, new pandemics, and geopolitical earthquakes unfolded alongside deeply embedded—and worsening—global problems such as escalating climate change, soaring levels of economic inequality, and widening North-South disparities in wealth and well-being.

Hence, we suggest referring to the present moment as the "Great Unsettling"—shorthand for the intensifying global dynamics of volatility, insecurity, and dislocation. This global systemic shift seems to be far more embracing than, for example, Karl Polanyi's "Great Transformation" leading to the collapse of four

European institutions: the international gold standard, the self-regulating market, the balance-of-power system, and the liberal state. Today's unsettling conditions involve serious disjunctures that reach beyond these general levels of global social order into the ontological bases of life on this planet itself.

Considering the ecological dimension, it is not just that humans have been pumping greenhouse gases into the atmosphere. Technoscientific interventions are taking apart and recombining the basic elements of nature. These extractive capitalist practices are setting up an existential disjuncture between nature as given—including human bodies as part of nature—and nature as reconstituted by human intervention. Even the useful concept of the "Anthropocene" as presently conceived does not capture this process adequately. Whether setting up conditions for hyperexploitation of the planet or deploying synthetic biology and climate engineering to save it, technoscience is now fundamentally unsettling all planetary systems. Indeed, the COVID-19 pandemic reveals in an indirect manner the ways in which humans have contributed to the basic disruption of our complex ecology over a long period through intensification of industrial-digital agriculture, destruction of habitats for wild animals, trade in exotic species, and reduction of species diversity. And as these forms of socioecological instability have intensified in recent years, the disjuncture between the social and the natural has widened even further.

Things look similarly troubling on the economic front. Instruments for abstracting value such as the esoteric derivatives traded at all major financial markets that almost brought down the world economy in 2008 are not just creating inequalities of wealth, but also wrenching the basis on which classical capitalism was built. In particular, the relation between abstracted risk-management and processes of material production and exchange continues to be widely accepted—wrongly—as the "real economy." At times of severe crisis such as the Global Financial Crisis, the disjuncture between "cybernetic" or "platform capitalism" and more embodied economic practices can be overtly seen to play out in damaging ways. Still, for the most part, the ascent of digital fiduciary capital shows no sign of abating.

Political aspects of the Great Unsettling include disruptions to the meaning of democratic political representation. These illiberal trends are not just giving succor to authoritarian national-populist parties, but also confirm longer-term and profound assaults on basic understandings of good governance, political truth, and state legitimacy. The very digital techniques now used to build political legitimacy—from algorithmic targeting to preference sampling—are undermining the long-term legitimacy of democratic public and private regimes. In a parallel way, formal institutions such as the post–World War II state that once served as a haven for ensuring basic social welfare and human security are now handmaidens to large transnational corporations responsible for deepening multiple forms of insecurity.

Culturally, transformations of what were once relatively stable and taken-for-granted frames of meaning and inquiry are now reaching far beyond various manifestations of identity crises. Celebrity-driven popular culture contents produced and distributed according to the profit motive are now generalized across our world as the meaning of social life in general. There is little doubt that the COVID-19 pandemic, in particular, has further intensified both people's subjective sense of insecurity and fears that familiar meanings and traditions are changing too quickly.

The overarching disjuncture powering these ecological, economic, political, and cultural dimensions of the Great Unsettling relates to technological change. To fully appreciate its global significance, it helps to think of globalization as involving four major formations. We can picture these macro-configurations of globalization as perpetually moving and changing tectonic plates possessing both an underlying structure ("formation") and visible morphology or shape ("form"). *Embodied globalization* refers to the physical interconnectivity and mobility of human bodies across the world. It is the oldest formation of globalization and endures in the contemporary movements of refugees, migrants, workers, travelers, entrepreneurs, digital nomads, tourists, and so on. *Objectified globalization* covers the interconnectivity and mobility of physical objects, in particular commercial goods, traded commodities, and tangible exchange tokens such as coins and notes. *Institutional globalization* refers to the interconnectivity and mobility of empires, states, institutions, TNCs, INGOs, churches, sports clubs, and so on. Like the other three formations, it has a long history running from the empires of antiquity to the creators of contemporary global supply chains. *Disembodied globalization* pertains to the global interchange of intangible things and processes, including the exchange and communication of ideas, words, images, meanings, knowledge, sounds, data, electronic texts, software programs, and novel cyber-assets such as blockchain-encoded cryptocurrencies. Since the start of the information and communication revolution in the 1990s, many of these movements have occurred as electronic transactions in cyberspace.

While all of these four principal formations always operate within particular historical moments, their individual dynamics can be different according to four criteria of measuring globalization: extensity, intensity, velocity, and impact. Bonded by substantial synergies and convergences, these tectonic plates of globalization are also driven apart by significant tensions and divergences. It is the total configuration of these four principal formations that determines the concrete manifestation of globalization at a specific point in history.

How does technological change fuel the most significant movement of disjuncture that destabilizes the current globalization system? We contend that increasing digitization of our lifeworlds has resulted in the intensification and acceleration of the disembodied formation of globalization. It has been charging ahead while the other three formations have been relatively constrained. On the surface, this

great digital leap pertains to everything associated with what some globalization scholars call the "fourth industrial revolution": exploding data flows, multiplying computer processing-power, novel digital devices and software packages, the expansion of bandwidth, and the emergence of 5G networks. Global exchange relations have been sped up through the growth of the digital platform economy and global commodity-chain management processes, including what has been projected as the Internet of Things. Production has become increasingly automated and works trans-spatially through robotics and artificial intelligence.

As the global mobility of people, things, and institutions fails to keep up with the broadening of digital networks and the deepening of electronic interconnectivity, the growing stature of disembodied flows in the globalization system begins to devour pieces of its adjacent tectonic plates. For example, the application of 3D printing has been transforming the global merchandise trade built on global value chains—an aspect of objective globalization—into regionalized and localized networks of exchange based on digitally enabled production-on-demand as close to the end market as possible. Familiar neoliberal practices of outsourcing and offshoring—hallmarks of objective globalization—have become destabilized and even reversed and localized as emergent disembodied globalization makes reshoring an attractive option for many companies. Similarly, the service sector is being cannibalized by digital globalization's growing ability to transform embodied workers thousands of miles away into disembodied telemigrants by means of new collaborative software packages and electronic project-management platforms.

The growing stature of disembodied globalization at the expense of the three lagging formations has resulted in the reconfiguration of incipient globality from a condition of relatively balanced spheres of interconnectedness to an uneven global system dominated by digital flows. The rise of social media serves as an instructive example that shows how the digital revolution devours embodied social relations both algorithmically and socially while unsettling the connectivity between public and private institutions worldwide. This frightening prospect of a datafied future dominated by AI and data-mining corporate tech giants is drawing attention to the post-human features of a new global cultural economy, wherein communication technologies constitute an indifferent globality of machines and the hidden agency of algorithms. Thus, the recognition that today's dominant formation of globalization is disembodied brings into sharper focus novel forms of digital surveillance seeking to control and exploit human behavior.

In subjective terms, the enhanced stature of disembodied globalization is unsettling the foundations of both modern and traditional personhood. The rapidity of the exogenous movement of globalization's disjunctures—as part of the broader and disproportionate growth of its disembodied formation at the expense of the other formations—means that people around the world find themselves increasingly creating their everyday lives in a digitally extended layer of meaning and

interchange. As a result of this advancing process of both objective and subjective cyberspatiation, humans frequently experience a sense of dislocation and confusion with regard to their familiar local, embodied places. As a result, they often romanticize the fixity of familiar local reference points in terms of language, ethnicity, food, sports, music, buildings, institutions, and so on. At the same time, they are becoming increasingly alienated from the newly perceived sluggishness of the local and its imperviousness to the thrills of digital speed and plasticity. Experiencing their own selves as divided between physical and cyber space, people tend to sentimentalize the local while spending increasing time in the malleable arena of global cyberspace. The emergence of such an "unhappy consciousness" as a result of digital globalization thus helps to explain both the strong appeal of national-populist forces and our fascination with digital technology.

These multiple junctures, then, explain much about the current state of globalization. In our view, what we are witnessing is reglobalization, understood as a profound rearrangement and reconfiguration of major globalization dynamics moving at different speeds and at different levels of intensity. Present-day globalization is being reshaped into a set of worldwide processes dominated by digital connectivity. None of this is to suggest that globalization-in-general is waning. Rather, we are witnessing an intensification of global complexity that requires close academic scrutiny in order to spark new lines of inquiry leading to necessary alternative understandings and public policies. The current COVID crisis should be seen as both an adumbration and an accelerator of a world of continuing and growing disjunctures tearing apart the waning neoliberal framework of interdependence built on the dominance of objective globalization, primarily in the form of tradable commodities.

Still, many commentators cite the protracted coronavirus crisis as evidence for a systemic shift toward deglobalization. After all, global interconnectivities and mobilities of various kinds have run up against major pandemic-related obstacles such as repeated national lockdowns, severe travel restrictions, extended travel quarantines, strict social-distancing rules, and a noticeable shift toward working from home. Other scholars, however, agree with our analysis that COVID-19 is merely accelerating an incipient phase of reglobalization, especially in the form of digitization. And we predict that this switch from embodied to disembodied forms of globalization is likely to intensify during this decade. To be sure, attempts to characterize the present phase of globalization often involve conflicting interpretations of vast data sets that split global studies scholars into two antagonistic camps. Pessimists interpret the current moment as a retreat of globalization measured by its allegedly diminishing component parts. Optimists, on the other hand, read it as an advance of globalization according to the purported disjuncture of its dimensions. Both sides present empirical evidence drawn from pertinent sources such as influential globalization indices in support of their respective positions.

Regardless of which side of the dispute one might favor, it should be clear that we need more scholarship to make sense of shifting globalization processes. Our era of the Great Unsettling represents an excellent opportunity to take stock of the current state of globalization. It is now more important than ever before to explore the compression of world-space and world-time in light of relevant developments in the past and with an eye toward its possible future trajectories. Indeed, the Enlightenment legacy of theorizing social change through the lenses of European modernity deeply influenced the modes of theorizing globalization that emerged in the 1990s. These framings were tightly linked to particular geopolitical arrangements, cultural practices, and power relations, as well as the shifting ecological conditions that shape all life on Earth.

It should not come as a surprise that most globalization studies deemed influential were constructed in the Global North—the powerful, capital-exporting countries of Europe and North America, as well as Australia and New Zealand. Its principal authors were overwhelmingly white, male, and prosperous academics who held distinguished appointments in prestigious northern universities. They tended to perceive and analyze the global on the basis of theoretical models developed in and pertaining to these privileged regions of the world. Thus, one important goal of this edited volume is to fortify the critical mode of thinking about globalization: to decolonize globalization studies by questioning its Euro-American moorings while at the same time surmounting its tendency to reinsert Eurocentrism masquerading as globality.

Hence, the purpose of this collection is not only to provide a timely, but also a genuinely global, reappraisal of globalization at the crossroads. Accordingly, this book contains twenty original essays written by both leading and emerging scholars of globalization hailing from five continents. Their geographical, cultural, ethnic, gender, and ideological diversity makes this volume one of the few collections on the subject that consciously and consistently challenges the still-dominant Eurocentric framework of globalization studies.

What is the state of globalization in our post-COVID world? How have past dynamics influenced current global interconnectivities, mobilities, and imaginations? How have incipient forms of globality itself been transformed by globalization? What might the future hold for globalization? Intending to stimulate informed responses to these questions, we asked the contributors to this volume to provide us with their expert assessments. We deliberately kept the thematic parameters of this collection as broad as possible to entice our contributors to analyze globalization dynamics from multiple thematic and ideological perspectives that cut across the existing disciplinary boundaries in the social sciences and humanities.

The book is divided into three parts. *Part I (Past)* spans primarily the two decades between the end of the Cold War and the Global Financial Crisis

(1989–2008). Still, we encouraged contributors to include relevant events and themes from previous centuries. What all of the essays in Part I have in common is their strong inclination to shed light on the present state of globalization by drawing on pertinent developments in the past. *Part II (Present)* corresponds roughly to the period from the 2008 Global Financial Crisis to the waning stage of the COVID-19 pandemic in 2023. Its contributions set the thematic stage for assessments of the current state of globalization from a variety of thematic and ideological perspectives reflected in the guiding questions provided above. *Part III (Future)* comprises a time frame from 2024 to 2040 and beyond. It contains informed speculations on how current globalization dynamics might change going forward.

The ultimate aim of this book is to offer a diverse collection of fresh new ways of exploring how globalization dynamics continue to shape our changing world in the twenty-first century. Unlike the capitalist triumphalism of neoliberal globalists at the turn of the twenty-first century, the contributors to this volume reject a reductionistic vision of globalization moving inexorably toward a determinate endpoint of a globally integrated free-market utopia. As their essays show, they are motivated by the ethical imperative to produce innovative, sophisticated, and critical forms of knowledge, which are sorely needed to help put our unsettled and ecologically threatened planet and its many sentient beings on a more sustainable and equitable path.

PART ONE

Globalization: Past

1

Dis:connectivity in Global History

Roland Wenzlhuemer

ABSTRACT

This chapter takes a historical perspective on processes of globalization. It evaluates how the historical sciences have hitherto applied the concept of globalization in historical research and examines some of the discontents that have emerged among historians in this context. The chapter claims that such discontents are often the consequence of an oversimplified, unidirectional understanding of globalization that ignores the role of disconnections in processes of global entanglement. It advocates a stronger focus on the interplay between global connectivity and disconnectivity (captured by the term *dis:connectivity*) and develops this claim with the help of examples from the history of telegraphy.

KEYWORDS

disconnections, dis:connectivity, global history, history of globalization, telegraph

CRISES AND GLOBALIZATION

Etymologically speaking, crises are dramatic—perhaps even life-threatening—phenomena (Koselleck, 1982). So far in this still-young twenty-first century, individual crises might seem temporary, but the state of crisis that plagues society more broadly seems all too permanent. For years now, we have been enduring a constant, deeply transformative state of emergency, consisting of overlapping economic and social crises (Macho, 2020). Not long after the horrific attacks of September 11th and the subsequent "Global War on Terror," much of the world suffered a dire financial crisis starting in 2008. Just as the global economy gradually started to recover, public consciousness began to grasp the reality of climate change, whose socioeconomic effects are becoming ever harder to ignore. As

people slowly started to engage with the climate crisis, it was overshadowed in the mid-2010s—at least in Europe—by the "refugee crisis" and the fears it evoked. While both of these issues remain with us, they have faded into the background, outshined by the ominous and mercurial COVID crisis.

For all their overlap and interrelations, these crises, of course, display important differences: they all move at their own paces and in their own temporalities; they all affect different regional epicenters, which can change over time; they all manifest themselves in our everyday lives in their own ways; they all engage particular collective and individual fears; and each one poses its own range of ethical dilemmas. There is one thing, however, that all these crises have in common: they are deeply embedded in processes of globalization, past and present. Politically and religiously motivated terrorism, for example, is nourished by a complex global web of geopolitical ambitions and cultural antagonisms extending back at least to the days of triumphant European imperialism (Dietze, 2016; Schraut, 2018). In economics, the subprime mortgage crisis in the United States in 2008 permeated global capital markets along countless reciprocal ties. A regional real estate bubble rapidly induced a global banking crisis. In ecology, human-induced climate change is inseparable from the history of industrialization and consumerism. Rapid growth, interregional mobility, and the global division of labor are what fuels it. Climate change pays no heed to human boundaries, national or otherwise. It is among the few literally global phenomena. Another, surely, is COVID-19. In early 2020, the virus spread effortlessly around the entire planet along the routes of global mobility networks. Dense, interconnected, global networks are what all these crises share. They would be unthinkable without processes of worldwide exchange that have grown over the last two hundred years or so. These crises make the scope and depth of global networks uniquely palpable.

GLOBALIZATION AND THE STUDY OF HISTORY

Crisis situations and vexing issues are not the only things that spread thanks to global networks. Global connections and processes of exchange utterly permeate our modern societies, and their particular anatomies are often the result of longstanding historical processes. Historical scholarship has accordingly long concerned itself with the emergence and social significance of such interrelations. For example, the history of European expansion, of colonialism, of imperialism, of the world wars, and of the international postwar order has preoccupied historians for decades. Since global history entered the scene around the turn of the millennium, there has been a research program to investigate phenomena of global entanglement and their historical significance beyond Eurocentric preconceptions. As a branch of history, global history privileges global connectivity and devotes considerable effort to identifying and analyzing global connections.

Processes of globalization are, thus, nothing new in the study of history. Still, many historians are uneasy with the term *globalization*. While economists and sociologists had already begun probing the concept of globalization in the 1960s and '70s, historians first came to it in the 1990s and proceeded to follow the trend that made the term "an academic buzzword that penetrated every discipline" (Epple, 2012).[1] The enthusiasm was, however, short-lived. It was quickly overshadowed by the sobering effects of the increasingly dominant approaches from cultural history and the increasingly strong critiques of the term's Eurocentricity. Cultural history found little value in a term whose universalizing scope offered so little room for cultural contexts and ascriptions of meaning.[2] Historical anthropology was suspicious of any concept whose teleological pretensions largely occluded historical actors and their agency.

Global history, transcultural history, and especially so-called "extra-European history" wrestled with the Eurocentrism that lurked inescapably in many analytical applications of globalization. Frederick Cooper provides one example. His critique marshaled episodes of African history to demonstrate how limited such an understanding of globalization and its attendant paradigm of integration can be (Cooper, 2001, 2005). Cooper's misgivings found broad approbation and helped to strengthen doubts about the analytical utility of the term *globalization* in African history as well as in the broader discipline (Austin, 2018: 23).

Some historians were nearly ready to eschew the term completely (Middell & Engel, 2010). Other studies employed such broad and hazy definitions of globalization that it lost any analytical value (Gills & Thompson, 2006: 4; Mazlish & Iriye, 2005: 2). And when the concept did play a meaningful role in a historical study, it quickly became apparent how many different definitions it was supposed to subsume and how easily this led to scholars talking past each other.[3] As a result of such obstacles, historians long avoided productive engagement with the concept of globalization and shied from probing its potential for historical research.

The term continued to pop up occasionally in historical research, but its uses were generally simplistic and referred merely to increasing global connections and integration. Globalization principally referred to deepening global connectivity (Giddens, 1990) or—conversely—the decoupling of human interaction (i.e., time sharing) from close proximity. Such interpretations have taken geographic space as a socially divisive element, thus identifying "time-space compression" (Harvey, 1989) as an important marker of globalization processes. The history of globalization remained oddly linear, both in the public discourse and in academic debates. People migrated. Markets integrated. Information propagated around the globe with great speed. Snappy metaphors were invoked to capture this view of globalization in easily digestible images. The world is shrinking. It's a village. "The world is flat" (Friedman, 2005).

Even as global history grew into a research program of its own, this concept of globalization remained largely unchanged in its core. Indeed, global history focused

still more intensely on its central motif: global networks of increasing density (Conrad, 2016; Komlosy, 2011; Wenzlhuemer, 2020). While invoking processes of global entanglement and their profound social significance, the principal phenomena under investigation remained largely undertheorized (Wenzlhuemer, 2019). Identifying and evaluating global connections in diverse causal relations throughout history was long understood to be the central empirical concern of global history and related disciplines, whether they used the term *globalization* explicitly or not.

Only in the past decade has global history begun to reflect on the concept of globalization and its analytical utility. If the term were to continue to find purchase in the study of the "transformation of the world" (Osterhammel, 2014), for example, the teleologies and automatisms it contains could no longer be ignored. One important step was to talk in terms of *processes of globalization* in the plural rather than of *globalization* in the singular, with each process situated in its own historical and social context (Barth, Gänger, & Petersson, 2014; Epple, 2012; Hunt, 2014; Osterhammel, 2017). Jürgen Osterhammel in particular made the case that pluralizing the concept of globalization would greatly benefit historical research. According to him, the plural would "politically defuse" the term and temper the "drive towards holism in the contemporary discussion" about globalization. "The plural simplifies the historians' lives by letting us preserve our attention to detail and skepticism towards generalizations without forcing us to evade the big questions" (Osterhammel, 2017: 12–13).[4]

However, Osterhammel continued, "the idea of singular (and unique) megaglobalization would remain lurking in the background" in spite of processes of integration being framed in the plural (Osterhammel, 2017: 13). Thus, even though a wider historical perspective extending beyond European history has led to a more refined and stratified concept of globalization, actual research practice remains focused on investigating increasing connectivity. In any event, this approach persists as the lens through which individual phenomena of globalization are viewed and analyzed.

As a result, historical scholarship—among other disciplines—still lacks a nuanced conception of global connections that can finally do away with outmoded presumptions about linearity and universality and is able to capture various forms and articulations of connectivity (Wenzlhuemer, 2019). Countervailing processes, interrupted connectivity, the significance of absent integration, and the role of cumbersome and circuitous exchange are areas of particular neglect. Connections can be slow and arduous. They can be cut or never come to be in the first place. They can be absent where one would expect them. They can leave gaps. When a subgroup of actors intensifies their connections, others will fall away—at least in relative terms. The relevance of connections lies not only in how they relate to other connections, but also because they are embedded in forms of disconnectivity and isolation. When the scope of globalization is expanded in this manner, it becomes amenable to more complex analyses of contemporary society and more useful as a tool for historical study.

GLOBAL HISTORY AND DISCONNECTIVITY

In historical globalization research that *has* dealt with the significance of disruptions, disintegration, and the absence of global connections, two types of argument recur. Either there is the objection that focusing too narrowly on global integration obscures the many whose practices remain untouched by such developments and whose cultural contexts risk being thereby overshadowed, or there is the attempt to show how processes of global integration can reverse in certain circumstances and lead to limited instances of deglobalization.

Jeremy Adleman's essay "What Is Global History Now?" (Adelman, 2017), which was intensely debated among historians when it appeared in 2017, is an example of the former. Adelman sharply criticized actual practice in global history. He expressed his unease in the face of some fellow global historians' euphoria, which can sometimes even verge into an unbecoming triumphalism. He warned of the increasingly normative aspirations of scholarship in global history. And he admonished all to avoid the historiographical traps that lurk whenever history is written only with reference to the experiences and convictions of highly mobile, cosmopolitan observers. These are just some of the valid criticisms that led to a lively discussion in the field about the significance of local contexts and "small spaces" in global history. The resulting process of *placing* history and probing the relationships between global, national, and other contexts is still far from over.[5] Another of Adelman's criticisms has found relatively little resonance. He calls on us to "dispens[e] with the idea that global integration was like an electric circuit, bringing light to the connected." Persisting with this metaphor, he continues:

> Lighting up corners of the earth leaves others in the dark. The story of the globalists illuminates some at the expense of others, the left behind, the ones who cannot move, and those who become immobilised because the light no longer shines on them. [. . .] To shift the imagery: understanding inter-dependence means seeing how it expands personal and social horizons for some, but also thins bonds with others. At least until those bonds become more meaningful than an Instagram list, there will be much more resistance to integration than we have admitted. To gain better insights into the dynamics and resistances to integration, to give as much airtime to separation, disintegration and fragility as we do to connection, integration and convergence, we are going to have to get rid of flat-Earth narratives and ideas of global predestination once and for all. (Adelman, 2017)

This passage contains three critical points for the meaning of disconnectivity. First, the metaphor of illumination and enlightenment refers to a pervasive, but subliminally held view of global integration that takes processes of integration to be momentous forces of historical significance. It coincides with the converse view of the disconnected as an inert mass. Adelman is criticizing the normative undertones of much research in global history. Second, he points out on another level the biases of historiographical attention. Global and globalization history have principally focused on mobile, globally active, and relatively cosmopolitan

groups of actors. Immobile people bound to their locales have largely been, to follow Adelman's metaphor, stuck in the dark. Global historians have generally ignored their stagnating and sometimes retrograde participation in globalization processes. Third, Adelman invokes forces of active resistance that the literature on global research has also neglected. In sum, it is a call to bring less normative baggage to the history of global integration and especially not to overlook the historical influence of those who were not the fulcrums of such processes of exchange and who instead might even have tried to actively avoid them.

Another context in which the discourse of global history has turned to interruptions and lacking global connectivity is "deglobalization," referring to phases in which the scale of global integration and its social significance decreased. The interwar period and the Great Depression are the classic examples. That commercial integration and trade volumes were much lower in this phase than was the case in the nineteenth century or in the postwar years has become a commonplace (James, 2001; Obstfeld & Taylor, 1998; see Williamson, 1996). Many such studies are based on a purely economic, "pendulum theory" of globalization, as Stefan Link has recently emphasized (Link, 2018: 344). Such interpretations assess globalization primarily in terms of global trade, the integration of global markets, and price convergence, which follow a sine-wave progression. Like a pendulum, periods of retarded integration or even deglobalization follow periods of intensive globalization (Link, 2018: 344).

In effect, absent, broken, or intermittent connections—disconnections—have not played a starring role in global history, nor have they been completely neglected. While branches of economic history have developed a model of alternating phases of globalization and deglobalization, Adelman has tried to prevent the laggards and the dissidents from being forgotten. Pierre-Yves Saunier, for his part, considers Adelman's call superfluous on the grounds that many studies in global history have considered the disconnections that pertain to their particular contexts as a matter of course. Saunier invokes a number of examples, like work on the history of communication and transportation, which necessarily also took note of immobile infrastructures. Sedentary, nonmigrating populations have always played a role in studies on the history of migration (Saunier, 2019: 38–39). Accordingly, Saunier comes to the conclusion that global history has in no way omitted or overlooked disconnectivity; rather, it is always already part of the equation.

FROM DISCONNECTIVITY TO DIS:CONNECTIVITY

Does it then follow that historical scholarship has already long grasped disconnective phenomena in the context of globalization and has long been approaching such objects of investigation with subtlety and nuance? Not even close. This becomes especially apparent in Saunier's very objection. Disconnective phenomena are treated as mere foils for whatever is actually being examined, if at all. There

is practically no theoretical or methodological engagement with disconnectivity. Such simple invocations and contrasts do little to disrupt global history's bias towards stories of integration; if anything, they subtly reinforce it. Claiming that disconnectivities have always been part of the equation distracts from the need to engage seriously with nonconnections, their role in constellations of connections, and how they relate to global connections.

Few things demonstrate this need as clearly as the manner in which disconnective phenomena are typically treated in relation to processes of integration. The typical case is a simple, binary connection/disconnection model, in which disconnectivity is simply treated as the opposite of connectivity. This tendency is as clear in Adelman's essay as it is in the many studies on deglobalization. When Adelman warns that focusing attention on the connected simultaneously leaves the unconnected in the dark, he is not only recapitulating one of the central arguments of contemporary critiques of globalization, which have long argued that the history of globalization has left many behind, exploited, and marginalized in its wake (Hardt & Negri, 2000; see, for example, Klein, 2002); he is simultaneously reinforcing the dichotomy. When economic history points to halts and reversals in processes of global integration, it also reflects a very simple, effectively binary conception of globalization.

In reality, though, connective and disconnective processes are deeply interwoven and interreact intensively, which becomes immediately apparent in relation to Adelman's argument. There is an interdependency between the connected and the unconnected, an inverse proportionality. As places, regions, and people around the globe integrate, the corollary is that others cannot (or don't want to) participate in those integrative processes to the same degree, and they will be left behind, relatively speaking. Global networks are lumpy; some branches are especially dense. The denser they are, the more conspicuous the patchy and empty areas become. To invoke another beloved metaphor of globalization research, the world is not "shrinking" as a whole; it's warping. The Suez Canal, one of the best-known examples of the history of global infrastructure in the nineteenth century, is a shining example. When the canal opened in 1869, it greatly facilitated and shortened the journey between Europe and Asia. The canal rerouted much maritime traffic. Valeska Huber, who has carefully studied the significance of the Suez Canal for the history of mobility, has stated that the canal turned the Mediterranean "from a lake to a lane" (Huber, 2012: 141). Other routes—in this particular case the long route around the Cape of Good Hope—saw less traffic and were then used primarily by sailing ships for freight. As one region grew more tightly coupled with the globe, another became (relatively) decoupled. Such warping of global space will also play a starring role in the case study described in the next section.

The same applies to the assumption that, in comparison to the late nineteenth century, the diminished flows of goods and capital during the interwar years constituted a period of deglobalization. This is but a small part of the bigger

picture and one sorely lacking context. The fact that the global economic crisis of the late 1920s and '30s propagated outward from the United States to soon grip the entire world is in itself a strong indication of the degree of global integration at the time. The global history of crisis management techniques (Patel, 2016), the simultaneous proliferation of international organizations (Herren, 2009; Sluga & Clavin, 2017), and the global dissemination of fascist thought (Framke, 2013; Hedinger, 2021) are further examples. Using the example of the interwar years, Jörn Leonhard flagged precisely this simultaneity of integration and disintegration. He wrote that "historically speaking, structural globalization has often coincided with sectoral deglobalization, with the two often reinforcing each other" (Leonhard, 2020: 413).[6] This applies to processes of global integration in general. Globalization is not a ratchet mechanism, nor is it a reversible macro process. It consists, rather, of many small, interrelated, complementary processes.

The actors and places of globalization are themselves always embedded in connective and disconnective circumstances simultaneously (Biedermann, 2021: 25), and they must be studied in that state of tension. Connections and nonconnections converge in particular places and in the lived experiences of historical actors, revealing their significance in their interrelations. The Suez Canal is an illustrative example here, too. The canal was one such place where connective and disconnective phenomena converged and collided in a number of ways. The canal did not merely connect the Mediterranean with the Red Sea, inaugurating a new sea route of global significance; it also bisected ancient caravan routes, requiring travelers and camels to wait for gaps in the sea traffic so they could ferry across the canal (Huber, 2010: 340).

In the article cited above, Leonhard mentions the "tension between globality and deglobalization" (Leonhard, 2020: 413), touching on one of the most important points of an adequate conception of globalization.[7] The tension that derives from the simultaneity and mutual constitution of connective and disconnective elements exerts a crucial influence on how processes of globalization develop and are shaped, experienced, and categorized. Its importance for the study of global history can hardly be overstated. From this perspective, the term *dis:connectivity* is invaluable because it captures precisely this mutually constitutive, tense relationship between global integration, disintegration, and the absence of connections whose relevance is only apparent in the context they collectively build. The term privileges neither connective nor disconnective processes, but focuses instead on their turbulent interplay, which becomes the decisive factor in grasping the social force of globalization. This is a fundamentally new approach to global history and to more present-minded studies of globalization—one that will continue to grow and be further articulated and developed in concrete empirical studies.

TELEGRAPHY AND DIS:CONNECTIVITY

To provide at least some hint of how dis:connectivity can facilitate new perspectives on processes of globalization, it is necessary to momentarily return to the history of telegraphy. This technology played a key role in the spurt of globalization that took place in the nineteenth century. The telegraph converted short messages into electric impulses and transmitted them along cables and wires with unprecedented speed over great distances. Around mid-century, the technology had become mature enough to enable transoceanic telegraphic connections between continents. By the turn of the century, a global telegraph network had grown that allowed, as contemporaries put it, "communication at the speed of thought" and greatly contributed to the "shrinking of the world." In most studies of telegraphy in global history, the technology is held to be an archetypal connector (Wenzlhuemer, 2013).

But that is only part of the story. On closer inspection, it quickly becomes clear that telegraphy did not shrink the world; rather, it—to follow the metaphor—warped it at best. The communicative distance between some regions contracted, while others remained unchanged and were thus pushed to the communicative margins. Disrupted connections were routine even along the most important trunk lines, frustrating a clientele that had rapidly become accustomed to the convenience of telegraphy. Moreover, telegraphy did not dissolve geographic space, as some contemporaries claimed (Morus, 2000; Stein, 2001); it joined the intense existing interplay of such space with other kinds of connectivity.

A letter to the editor that was printed in the *Times of London* (Anonymous, 1870) leaves no doubt about the first two points at least. In this letter, the author describes the difficulties he had recently experienced in trying to send a telegraph from London to Calcutta in the evening. He begins describing his late-evening trek through London with the following sentence: "I had occasion to telegraph to Calcutta between 9 and 10 in the evening." The necessity of doing so seemed to the author completely ordinary and understandable, requiring no further explanation or justification. The ability to communicate telegraphically with distant geographies had become, for a certain type of actor, a matter of course already by 1870. But the first complications were not long in coming. The author noted that he was uncertain as to "what offices would be open at that hour." Therefore, the safest course of action seemed to be to proceed to the main branch of the General Post Office. Once there, however, a sign on the door directed him to the telegraph agency in Cornhill, which would accept telegrams from 8 p.m. to midnight. Upon arriving at this next destination, the author opines that the agency was direly understaffed and that the agent serving him seemed perplexed at the author's wish to send a telegram to Calcutta: "'Calcutta!' he said, and looked very much as if I had asked to telegraph to Fernando Po. [. . .] Now, Sir, Calcutta is not an unknown

place. I thought it was the capital of British India, and that it was in close and constant communication with the City of London."

This passage speaks volumes. From the protagonist's point of view, this "close and constant communication" brought Calcutta much closer to London than the counterexample he invoked of Fernando Po, the island now known as Bioko off the coast of Cameroon. Fernando Po is supposed to exemplify utter isolation. But in terms of pure geography, Fernando Po is around 2,500 kilometers closer to London than Calcutta, and in the nineteenth century it occupied a strategically valuable position on Africa's west coast. European ships frequented the island, and it was an important port for the British navy. Still, the author of this letter to the editor used it to symbolize remoteness, while treating Calcutta as if it were just around the corner.

Indeed, the global telegraph network of the time had developed a particular structure that promoted such views. Beyond the Mediterranean and the European coastal areas, the initial attempts to lay subsea cables across great distances in the 1850s and 1860s focused on a transatlantic connection and a cable to India. The first great overland projects, like the "Siemens Line" (Bühlmann, 1999), extended from Europe towards South Asia. These enterprises clearly took their cues from the imperial interests of the European powers, especially the British Empire. Thus arose a strong east-west axis in the global communication network that connected Europe—especially Great Britain—in the center with North America in the west, passing across the Mediterranean, the Red Sea, and the Indian Ocean to India in the east. This axis extended further eastward to Oceania in the 1870s (Wenzlhuemer, 2013: 105–23). In later years and decades, the network propagated outward from this core axis. The east-west trunk long remained the stretch with the highest bandwidth and the greatest demand, while other regions were markedly less connected. Connections along the African coast did not come until much later, let alone overland lines into the continental interior. Although the continent of Africa was long an undeniable obstacle when planning routes between Europe and Asia because of the circumnavigation involved, this pattern was fundamentally disrupted by the particular structure of the telegraph network as well as the opening of the Suez Canal in 1869 (see previous section). Telegraphy did not "annihilate" space, but warped it. In effect, Fernando Po became much less central. Contraction in one dimension coincided with expansion elsewhere (Wenzlhuemer, 2013: 123–29).

Returning to the letter in the *Times*, the addled agent sent the agitated author to the office of the Falmouth, Gibraltar and Malta Telegraph Company on Broad Street. There he learned that the cable to India was out of service at the moment. "[The clerk] informed me that the Falmouth line was broken between Lisbon and Gibraltar, that it would consequently take five or six days to telegraph to Calcutta, and that his company advised the public for the present to send their messages through Persia by the Indo-European Company, whose office was in

Telegraph-street." Not until he reached the telegraph agency on Telegraph Street did the author finally manage to send his telegram to Calcutta.

The protagonist demonstrated little understanding for the situation in his letter: "I confess I thought it odd that in the centre of the heart of the British Empire a man should thus be sent from pillar to post, according to the hours of the night, in order to find the right end of the electric wire which is now the very nerve of the social body." Why anybody should need to send a telegram to British India so late in the evening was simply a nonissue for him. Global connectivity was taken for granted, even though obstacles and interruptions naturally remained. In this case the telegram only traveled to India overland, because the undersea cable was out of service. This was a common occurrence in the 1870s and 1880s, as repeated mentions in the telegraph companies' annual reports can attest. In 1881, the undersea connection between Great Britain and India was completely inoperable for more than a month in July and August. Four years later, the cable was down between June and October (Administration Report, 1874, 1883, 1890). And the *Administration Report of the Indo-European Telegraph Department* stated that, for the fiscal year 1882–83, "The Suez route was either partially interrupted or defective in one or more of its cable sections for nearly the entire official year" (Administration Report, 1883, Paragraph 31). In the second half of the nineteenth century, such disruptions to undersea-cable connectivity were routine. Overland lines to India were little more reliable (Bektas, 2000: 692). Adding insult to injury, saboteurs and charlatans would sometimes deliberately disrupt the connections (Wenzlhuemer, 2015: 358–59).

To understand the third of the points listed above, we must leave the letter writer's London and go to a more remote node in the global telegraph network. The network continued to branch out as the nineteenth century progressed, necessitating ever more relay stations towards the end of the century. For infrastructural reasons, many were built in exceedingly remote locations, like small islands in the Atlantic, Pacific, and Indian Oceans that served as intermediate stations and network nodes. Three such stations can perhaps exemplify the wider phenomenon: Ascencion, an island in the South Atlantic, became an intermediate station between Cape Town and Cape Verde in 1899 and 1900, with a cable leading to Europe and another to South America; a telegraph cable between Freemantle, Australia, and the east coast of Africa opened in 1901, with the Cocos (Keeling) Islands in the Indian Ocean serving as a relay station; and between 1902 and 1903, a transpacific cable connected Fiji with Vancouver, passing through the tiny atoll of Tabuaeran (a.k.a. Fanning Island). European telegraphers performed their duties at these and other distant, isolated locations, where they were ensconced in very different connective contexts simultaneously. They were among the first people on the planet to hear and propagate the latest news, but they themselves were practically immobile. They were forbidden from using the telegraph for private purposes. Communication with friends and family could only proceed by mail.

Supply ships might only land every few weeks, and delays and attendant supply shortages were common. The result was an extraordinary tension between the extremely high and low global connectivity that these actors had to navigate. Upon the outbreak of the First World War, an especially illustrative incident occurred on Fanning Island. German warships from the East Asia Squadron received orders to destroy the British relay station on the island and all telegraph cables connected to it. The telegraphers on Fanning Island received advance warning that a German cruiser was headed their way, but they could do nothing but wait for the German landing party to arrive and destroy their communication equipment (Wenzlhuemer, 2020: 47–68).

RECAPITULATION

Even a cursory glance at the history of telegraphy, like the one above, reveals several kinds of dis:connectivity in processes of globalization. First, the connectivity of some regions and actors coincides with the others' relative disconnectivity, which the structure of the telegraph network in the late nineteenth century makes imminently clear. Further, interruptions, delays, and communicative detours regularly afflicted the global telegraph network. Despite the regularity of transmission problems of various kinds, telegraphy induced high expectations with regard to connectivity. The letter to the editor described above clearly exemplifies the resultant dis:connective tension. And finally, telegraphy reveals the simultaneity of different forms of global connectivity that overlapped and intersected at particular people and places and could manifest in very different ways. Such was the case on remote relay stations, where the interplay between communicative and spatial connectivity and disconnectivity becomes immediately perceptible.

These are just a few particularly clear examples of what dis:connective phenomena can mean in processes of global integration. They are especially interesting because they derive from the emergence of the global telegraph network in the late nineteenth century, which historical research on globalization tends to treat as an archetypal case of global integration. Instead, this case demonstrates that globalization implies disruptions, delays, and absences in varying forms and intensities, not linear and total interconnectedness. The specific character and social significance of integration processes are unthinkable without reference to such processes. This applies just as much to current developments as it does to the history of globalization, as is evident in the shortages in the United Kingdom following Brexit and the constipation of global logistics caused by the *Ever Given* freighter running aground in the Suez Canal. The major crises mentioned in the introduction also indicate the tension between global integration and disintegration. The Global Financial Crisis that began in 2008 grew out of a speculative bubble in the American real estate market. Its origins are to be found in the tension between locally bound, immobile property (i.e., real estate) and

its valuation in highly fluid, deeply integrated financial markets. This interplay becomes even clearer upon consideration of what catalyzed the crisis. While panic traveled along dense global capital flows, the fundamental crisis was one of trust—an utterly primal form of connection—in this highly networked system. The same applies to the climate crisis, whose creeping, almost surreal progression contains a disconnective element. So far, attempts to counter climate change have failed principally due to lack of will and the limitations of international cooperation. Although global warming affects the entire planet, parochial interests and structures have trumped global cooperation in managing the crisis. Large-scale refugee migrations exemplify more than just human mobility. Rather, their principal characteristics are unfair treatment, closed borders, long delays, strict asylum regimes, and even brutal "pushbacks." Here, too, connective and disconnective elements interlock directly.

All these crises are not just instances of global integration; they directly highlight the disruptive, nonconnected aspects of globalization. With their constant interplay, both factors shape the course of the overall process. The concept of dis:connectivity is an attempt to gain analytical purchase on such phenomena, one that will yield new perspectives on past and current processes of global integration and perhaps even to better understand how such processes are involved in crises.

NOTES

1. Author's translation.

2. Even the groundbreaking article by Arjun Appadurai (1990) on cultural globalization, which sought to reconcile the concept with cultural history, was based on a linear model of integration despite the "disjunctures" in the title.

3. Dennis Flynn and Arturo Giráldez conducted an instructive debate with Kevin H. O'Rourke and Jeffrey G. Williamson that illustrates the point (Flynn & Giráldez, 1995, 2008; O'Rourke & Williamson, 2002, 2004).

4. Unless otherwise indicated, all translations are the author's.

5. These reminders are doubtlessly justified and, in many ways, overdue because they rest on accepted and uncontroversial foundations of historical scholarship. The question is one of critical reflection and situatedness, of the normative or explanatory character of scholarly research. Still, together with others who were pointing out the limitations of global history (see Bell, 2013, 2014), Adelman's essay unleashed a lively, sometimes emotional debate about the state, the potential, and the weaknesses of work in global history. Richard Drayton and David Motadel, for their part, published a widely received and equally incisive reply to Adelman and Bell in 2018 in the *Journal of Global History* (Drayton & Motadel, 2018). Ghobrial (2019) provides the best summary of the debate to date.

6. Author's translation.

7. Author's translation.

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2

What Was the Arab Spring?

The Promises and Perils of Globalization

Valentine Moghadam

ABSTRACT
The 2011 Arab Spring protests took place amidst the Great Recession, with limited or declining foreign direct investments in the region, rising food prices, high rates of unemployment (especially among youth), and low public and private investments. In 2014, oil prices fell. At the same time, the fallout from the 2003–4 U.S./UK invasion and occupation of Iraq, the NATO invasion of Libya, and the attempts to destabilize the Syrian regime helped spawn the so-called Islamic State, which wreaked havoc on communities in Iraq and Syria and had spillover effects in Tunisia. Hailed as the one democratic outcome of the Arab Spring protests, Tunisia began to unravel economically and politically, as it amassed a large debt burden, was unable to reduce high youth unemployment, and then faced the 2020–21 COVID-19 pandemic.

As the latest stage of capitalism, neoliberal globalization turned out to be not the great equalizer that its early proponents claimed, but rather something closer to a wrecking ball. This chapter contributes to the literature on globalization's dimensions and evolution through application to the Arab region and the Tunisian case study. Concepts from Marxist and world-systems theories will elucidate the promises and perils of neoliberal capitalist globalization as experienced in a democratizing polity.

KEYWORDS
Arab Spring, crisis, democratic transition, globalization, Tunisia, world-system

In March 2022, *The Economist* magazine declared that the Russian invasion of Ukraine was "the third big blow to globalization in a decade," the first two being former U.S. president Donald Trump's trade wars and the onset of the COVID-19

pandemic in 2020, which revealed the fragility of global supply chains (*The Economist*, 2022c). In typically liberal fashion, the magazine warned that "free trade and freedom," which were to have "gone hand in hand," had fractured, and that countries might be pursuing protectionism and even self-reliance. It is true that in the wake of the Russia-Ukraine war, precipitated by NATO's refusal to cease its eastward expansionism, the price of wheat and fuel rose. But the weaknesses of neoliberal capitalist globalization had revealed themselves much earlier, in the form of the Asian, Russian, and Latin American financial crises of the late 1990s; the U.S. invasions of Afghanistan and Iraq; the Great Recession of 2007–9, followed by austerity measures and indebtedness; and the growing wealth of elites at a time of stagnating wages, rising prices, and deteriorating public services.

Those "contradictions" (in Marxist parlance) generated the social movements and new governments of the early twenty-first century (the World Social Forum and the Latin American "pink tide") and the protest wave of 2011, encompassing the Arab Spring protests, the European anti-austerity protests, and Occupy Wall Street. Even so, the hierarchical world-system remained intact, and countries in the Middle East and North Africa experienced harsh economic sanctions (Iran) and military invasions (by NATO in Libya, by numerous countries in Syria, and by Saudi Arabia and the United Arab Emirates, armed by Western countries, in Yemen). The one success story of the Arab Spring, Tunisia, was spared military incursions, but neither was it rewarded for its admirable procedural democratic transition, whether from the European Union (EU) or the system's hegemon, the United States. By 2021, its national debt had ballooned to 90 percent of GDP, its unemployment rates remained in the double digits, and its political system was fraying. The problems were exacerbated by the rising price of food and fuel in the wake of the Russia-Ukraine-NATO (EU-U.S.) crisis. For Egypt as well as Tunisia, the price of wheat skyrocketed (Hamzawy et al., 2022).[1] Had the leaders of NATO, the U.S. government, and the EU even considered the implications for citizens in medium- and lower-income countries of provocation of Russia, a possible war, and sanctions?

This chapter begins with a summary overview of the trajectory and travails of the Arab Spring protests, followed by a focus on Tunisia's democratic transition under conditions of neoliberal capitalist globalization. The case of Tunisia's economic travails points to how the economic and political dimensions of contemporary globalization can be disconnected or decoupled. That is, despite globalization's presumed promotion of democratization, its economic model—neoliberal capitalism—undermines prospects for sustained democratic development or an economically viable democratic transition. Source materials for this chapter include the many academic studies produced after the 2011 uprisings; press accounts; government, UN, and NGO documents; and my own observations and interviews over two decades. The chapter is framed by world-systems analysis, which posits a hierarchical world economy driven by capital accumulation imperatives and an interstate system led by a hegemon. The economic zones

of core, periphery, and semiperiphery may at times coexist in some degree of equilibrium but are periodically beset by crises—or challenges from within the semiperiphery—that may augur systemic transition and chaos. Developments in the twenty-first century exemplify these postulates.

THE ARAB UPRISINGS: BACKGROUND AND OVERVIEW

The Arab Spring, which began with protests in Tunisia in December 2010, initially raised expectations of region-wide democratic transitions, along with new social and gender contracts (Karshenas, Moghadam, & Alami, 2014). Some studies attributed the structural causes of the uprisings to the fallout from two decades of neoliberalization, including rising prices, high unemployment, and deteriorating public services (Achcar, 2013; Hanieh, 2013). Others explored the combination of internal and external factors and forces: authoritarianism and unpopular regimes; collective action legacies; democracy promotion and diffusion of norms of human rights; the effects of the Great Recession (Brownlee, Masoud, & Reynolds, 2015; Mako & Moghadam, 2021). The protests engulfed many countries in the region; four autocrats fell (in Tunisia, Egypt, Libya, Yemen); and other governments quelled the protests and avoided revolts through some degree of reform and concession.

The Arab uprisings failed to produce either transformative revolutions or consolidated democratic transitions. Shamiran Mako and Valentine M. Moghadam (2021) attribute this in part to the less propitious international and regional environment for such protest movements and the deleterious effects of external intervention, both coercive and noncoercive. In Bahrain, Libya, Syria, and Yemen, outside intervention in support of, in opposition to, or to neutralize regimes drastically altered protest trajectories (see table 2.1). Internal factors also played a role in determining the outcomes: the quality of political institutions, the capacity of civil society, and the strength and status of feminist organizations. In this respect, only Tunisia had the requisite advantages that enabled it to embark on a democratic transition. The 2010–11 protest demands for jobs, bread, and dignity reflected a desire for a *social* (if not socialist) democracy.

Tunisia established a parliamentary proportional representation system of government, with various freedoms as well as state obligations enshrined in its 2014 constitution. However, it almost immediately felt the consequences of the regional and global crises. The NATO intervention in neighboring Libya had dire effects in terms of a deteriorating security situation as well as revenue losses (see discussion below). Western military incursions into Iraq, Libya, and Syria contributed to the rise of the terrorist network ISIS and its "caliphate," attracting youth from Tunisia's deprived regions. The withdrawal of foreign direct investment (FDI) exacerbated unemployment and the onset of the COVID-19 pandemic worsened the overall

TABLE 2.1 Arab Spring Protests: Divergent Outcomes, 2011–2022

Nonviolent; no external military intervention	Violent; external military intervention
Tunisia: procedural democratic transition; economic difficulties; president suspends parliament July 2021	Bahrain (Saudi/GCC intervention): return to status quo
Egypt: MB win elections; more protests; army intervenes summer 2013	Libya (no fly zone; NATO assault): fractured, failed state
Morocco: Mouvement 20 fèvrier rallies lead to constitutional amendments	Syria (Turkey opens border to arms and jihadists): massive refugee outflow; fractured state but remains intact
Algeria and Jordan: protests quickly quelled with reforms and concessions; Algeria experiences anti-government protest wave in 2019 (government concessions)	Yemen (Pres. Saleh resigns after attacks): new government challenged; Saudis and UAE attack in 2015; devastation and hunger through 2022

socioeconomic situation, which in turn resulted in political polarization and dysfunction. Neoliberal globalization's promise of a new interconnected world order of cooperation, freedom, and trade proved false.

In what follows, I focus on Tunisia's place in the global system and its patterns of economic, societal, and political development. In world-systems terms, Tunisia is a peripheral country with a small economy that pursued a modernizing strategy characterized by a welfare state, an independent foreign policy, and a dynamic civil society. In the 1960s Tunisia briefly experimented with a socialist development strategy but then moved toward a more liberal economy, which subsequently encountered debt, structural adjustment policies, and a wave of privatizations. The shift was in keeping with the "Washington Consensus," the term coined by economist John Williamson to refer to a set of market-led policy prescriptions for Latin American economies managed by the Washington, DC–based World Bank, International Monetary Fund, and the U.S. Treasury. Policies such as "fiscal discipline" and ending subsidies, trade liberalization, privatization of state enterprises, and deregulation were then promoted for all world-regions.[2]

TUNISIA: ECONOMIC OVERVIEW

Tunisia's experience with debt and structural adjustment was accompanied by worker protests, the rise of Islamist militancy, and increasing repression. The *Union générale des travailleurs tunisiens* (UGTT) organized wide-scale protests in 1984 and provided refuge for dissidents and the country's weakened Left activists (Netterstrøm, 2016; Omri, 2015; Zemni, 2013). The end of the decade saw the removal of the country's first postindependence president, Habib Bourguiba, and his replacement by Zein El-Abedin Ben Ali. The Islamist movement was repressed, the two feminist organizations that had formed earlier were legalized, the former communist party was allowed to operate under a new name, and other civil society

actors—notably the Bar Association, the Human Rights League, and the UGTT—became more active.[3] Nonetheless, the economic policy framework continued. If the 1980s were a period of debt restructuring through structural adjustment policies for many Third World countries, the 1990s consolidated the wholesale shift to privatization, liberalization, and flexibilization. Tunisia was no exception.

In the 1980s and 1990s, export-led manufacturing boomed and became the most female-intensive sector of the economy and the labor force (Moghadam, 1998: 68). Production of garments in Tunisia had close links with enterprises abroad through FDI, foreign contracting, and localization in export-processing zones. However, the success of the Tunisian garment industry was contingent on special trade policies giving it preferential access to the EU market. Once other countries, mostly in postcommunist Eastern Europe, received similar treatment and Tunisia lost its privileged position, the performance of the garment industry worsened (Aita, 2008: 164). The major trading partners and foreign investors in Tunisia's manufacturing sector were from France, Spain, Italy, and to a lesser degree Germany, and overconcentration of exports in EU markets, especially southern ones, exposed Tunisia to recessions in those markets from 2009 onward (Jaud & Freund, 2015: 11–12), resulting in job losses and higher unemployment. The Great Recession then took a toll. More job losses ensued after the 2011 political revolution, hitting women especially hard (Mouelhi & Goaied, 2017).[4]

Throughout this period, and to remain competitive, "flexible" employment contracts expanded in Tunisia's private sector, which meant lower wages, more temporary work, and less job security for workers. Flexible forms of employment include job rotation, short-term contracts, part-time work, flexible work hours, weekend work, night work, and overtime work. A study found that workers involved in flexible work practices faced a higher risk of work injuries and more mental strain than workers in a more traditional work organization (Haouas & Yagoubi, 2008). Flexibility and low wages were behind the 2008 strikes in the industrial region of Gafsa, but conditions did not change. The privatization and liberalization program continued. In the early years of the new century, the Ben Ali government tried to break up the national airline, Tunis Air, into smaller companies, privatize them, and sell them one at a time. Kasper Ly Netterstrøm (2016) explains how the UGTT's airport workers' union opposed the gradual privatization, leading the national body to call a strike. The government tried to buy off union leaders with generous retirement packages, but the issue continued until the 2011 revolution, after which Tunis Air was renationalized.

In 2012, workers benefiting from indeterminate-length contracts constituted 43 percent of the working population, but fully 44.6 percent had no contract at all, while 12.3 percent were on fixed contracts (CREDIF, 2015: 47). Declining government expenditure entailed a contraction of the public-sector wage bill, and public-sector employment as a percentage of total employment in Tunisia continued to fall. By 2013, public-sector employment as a percentage of total employment in Tunisia had fallen to about 22 percent, just above the OECD average, and

considerably lower than the oil-rich economies (*The Economist*, 2015). Economists writing on the economic costs of the Arab Spring have highlighted the significant output loss in Tunisia: 5.5 percent, 5.1 percent, and 6.4 percent of the GDP in 2011, 2012, and 2013, respectively. One study mentioned "the high dependence of Tunisia's economy on economic activity in the Euro area" and found that Tunisia's sluggish economic activity after 2011 "was driven by weaker demand from the Euro-area" (Matta, Appleton, & Bleaney, 2016: 12).

Tunisia's assets include a diversified economy, a relatively well-developed infrastructure and well-trained workforce, and a strategic geographic location between Europe and Africa. However, scholars have noted that the growth of nontradable sectors, such as construction, real estate, wholesale and retail trade, transport and food services, have led to what Dani Rodrik (2016) has termed "premature deindustrialization." Even though high-productivity service sectors—finance and insurance, and information and communications—have grown rapidly in Tunisia, they have done so from a small base with limited impact on the overall structure of employment (Assaad & Marouani, 2021).

Moreover, Tunisia's role in the neoliberal globalization process reflected a pattern seen everywhere: uneven and unequal development and regional and class disparities. Parts of Tunisia also suffer from environmental degradation associated with extractivist practices, as in the Gafsa mining basin. We will return to Tunisia's uneven and unequal pattern of development. First, we examine the security and economic fallout from the 2011 NATO military assault on Libya that dislodged the Ghaddafi regime.

Regime Change in Libya and Effects in Tunisia

Prior to 2011, oil-rich Libya had been a source of employment for Tunisian migrant workers, and many Libyans turned to Tunisia for banking, vacations, and medical treatment. A sober assessment of the fallout from the NATO bombing of Libya notes the ensuing state collapse and fragmentation (World Bank, 2017). By 2014, "about 60,000 Tunisian workers (out of 91,000) officially registered in Libya [had] returned home." As a result, official remittance inflows from Libya dropped to TD 38.1 million in 2014, from about TD 55.9 million in 2010—a decline of 32 percent. Tunisian workers repatriated included construction sector employees, self-employed businesspersons, and similar categories of workers. The World Bank report notes that Tunisia's poorest regions were adversely affected by both the fall in remittances and unemployment, as many of the Tunisian workers who returned home were from those areas (World Bank, 2017: 2, 7).

Tunisia's financial and monetary authorities continued to allow Libyans to open bank accounts, thereby providing useful foreign currency inflows and much-needed liquidity to Tunisia's banks. In 2014, Libyan deposits in seven Tunisian banks surveyed in the World Bank report amounted to TD 2.07 billion (2.4 percent of 2015 GDP), or 12 percent of total deposits in those seven banks.[5]

Cash was also brought over the Tunisia–Libya border after being declared to Tunisian customs, according to the 2017 World Bank report (p. 1), which adds that informal currency exchange agents in Tunisian border towns processed an estimated 1.25 billion Libyan dinars (LD) in 2015 (about TD 814 million) from Libyan travelers entering Tunisia. However, that level of cash inflow was three times lower than in 2013.

Tunisia had been a popular resort destination for Europeans, as well as for Libyans and Algerians. After 2011, the growing security threats lowered Tunisia's appeal as a tourist destination. According to the 2017 World Bank report, between 2010 and 2015, foreign tourist arrivals dropped by 9.5 percent per year, compared to an increase of 3.2 percent per year, on average, from 2000 to 2010, with a concomitant dramatic decline in night stays in hotels and similar establishments. The two terrorist attacks in Tunisia in 2015—at Tunis's Bardo Museum in March and the tourist resort of Port El Kantaoui in June—led to a sharp contraction in Tunisian tourism. Tunisia generally had shielded itself from the political risks and deep civil strife witnessed in other Arab Spring countries such as Libya, Yemen, Syria, and to an extent, Egypt. However, ongoing, unpredictable security threats continued, exacerbated by substantial regional spillovers.

Although Tunisia's initial transition period (2011–14) was beset by security and economic challenges, its dynamic civil society organizations and modern and well-functioning institutions averted the violence and collapse seen elsewhere. The adoption of a new constitution in early 2014 was a major accomplishment. However, challenges remained, as the country's uneven development, high unemployment, lack of substantial external support, and the rise of ISIS attracted youth from Tunisia's deprived regions. Indeed, despite Tunisia's reputation as one of the more liberal countries in the Arab world and the region's only democratic success story, it became a fertile recruiting ground for the so-called Islamic State of Iraq and Syria. In turn, the Tunisian government sharply increased defense and security spending (Mako & Moghadam, 2021: 199–200).

Uneven Development

Despite efforts to reorient its economy in the 1990s and into the new century, Tunisia failed to promote private sector jobs. Indeed, private sector employment became overwhelmingly informal and precarious (Assaad & Marouani, 2021; Weilandt, 2018). Sectors with the potential to generate formal private sector jobs—manufacturing, finance, tourism, communications, and other high-end services—grew too slowly, played a limited role in the overall mix of employment, or became victims of the Great Recession. Years of restructuring and privatization also reduced the employment rolls. In the Gafsa mining basis, for example, employment contracted when the Gafsa Phosphate Company, once a state monopoly, was increasingly privatized (Gobe, 2010). Although many of the unemployed had but a high school degree, college-educated youth found themselves increasingly without

job prospects. The Union of Unemployed Graduates was established in 2006 and gained legal recognition in 2011 (Bishara, 2021).

Unemployment became more pronounced among women, youth, and low-income groups (OECD, 2018; World Bank, 2015: 8). Whereas total unemployment stood at 15 percent in mid-2017, it was highest among youth (35.7 percent), women (21.5 percent), and university graduates (39.5 percent, with women at 40 percent). The total labor force participation rate remained low (51.7 percent), particularly among women (28.2 percent).[6] High unemployment rates are found in the interior regions of the southeast and southwest, which also experience poverty and deteriorating social services and physical infrastructure. Sadiki (2019) refers to the "multiple marginalizations" that are present in such regions, which have led to frequent protests in recent years. According to one analysis (Weilandt, 2018: 213), "Overall poverty is 10 times higher in the cities of Kairouan (34.9%) and Kef (34.2%) than in the city of Tunis (3.5%). On average, 88% of the Tunisian population has access to drinkable tap water. While this covers almost 100% of the population in the affluent parts of the country, it only includes half of the citizens of Sidi Bouzid."[7]

After 2011, successive governments increased social spending and public sector hiring to cope with the rising social unrest and youth unemployment, but this was carried out through IMF loans that came to burden the country. The IMF continued to monitor Tunisia for currency devaluation, containment of the public sector wage bill (through retirement packages and wage and hiring freezes), "flexibility" with the minimum wage, recapitalizing the banks, and "strengthening the Central Bank's independence" (Aliriza, 2020: 37–38). The UGTT compelled the government to approve salary increases in 2018, but these were offset by inflation. Protests and strikes in the country's interior, where residents demanded more employment and investment, paralyzed gas, petroleum, and phosphate production. Most of Tunisia's debt is external debt, and in July 2020, with a shrinking economy but increased spending to offset the effects of the COVID-19 pandemic, the government sought to delay debt repayment to Saudi Arabia, Qatar, France, and Italy.[8]

Voices within Tunisia's civil society and government as well as internationally called for debt restructuring or cancellation, as debt-servicing repayments were high at a time of decreasing government revenue. At a parliamentary session at the start of his term in September 2020, Prime Minister Hichem Mechichi noted that the public debt servicing amounted to twice the state's development expenditure (Arab Center for Research & Policy Studies, 2020). Tunisia's public-debt-to-GDP ratio increased from about 40 percent in 2010–11 to 77 percent at the end of 2018 (Aliriza, 2020: 35–36). As of 2022, it was perhaps as high as 90 percent. An OECD report highlighted problems associated with the budget deficit, debt, and the pandemic (OECD, 2021). A 2019 UN Human Rights Council report states that Tunisia's prime minister at the time "stressed the fiscal challenges the country

was facing in meeting the rising expectations of the Tunisian people with regard to their social and economic rights, and urged the international community to recognise the importance of contributing to the country's economic development which is integral to consolidating the democratic gains of the revolution" (Human Rights Council, 2019: 2). A recent study of Tunisia's economic woes reiterated calls for more European assistance to bolster Tunisia's economy and help consolidate its democratic transition (Megerisi, 2021).

Instead of loans, Tunisia needed investments and growth in sectors such as manufacturing, finance, communications, tourism, and food processing, in part to offset premature deindustrialization and employ more workers. The end of the Ben Ali era and the transition to democracy created high expectations among the population. But the new democratic system "has so far failed to satisfy peoples' hopes for improved living standards. In fact, it has presided over their deterioration" (Weilandt, 2018: 217). Social and economic grievances generated protests, often met with harsh government interventions followed by more societal and trade union defiance. Protests in the Gafsa mining region—caused by grievances over low wages, unemployment, and how salaried workers were selected by the Gafsa Phosphate Company—disrupted phosphate production, leading to police action (Sadiki, 2020). In June 2020, healthcare workers went on strike to protest cutbacks and reduced salaries and to demand better working conditions.[9]

Tunisians' discontent with their living conditions became a fundamental threat to the country's democratic transition. Economic difficulties led to political paralysis and dysfunction, which in turn precipitated a drastic intervention by the new president, Kais Saied. In July 2021 he fired the prime minister, suspended parliament, and assumed vast executive powers.

WHAT KIND OF DEMOCRACY UNDER CONDITIONS OF NEOLIBERAL GLOBALIZATION?

Decades of state-led development, which had expanded the public sector, had also generated high expectations for improved socioeconomic rights. In turn, this motivated teachers, health care workers, and civil servants to be at the forefront of public protests and, in combination with other sectors of the population—such as industrial workers, the marginalized poor, and precarious workers—to exert pressure on government. Indeed, Arab Barometer survey data shows that citizens in Tunisia, as in other Arab countries, generally associate democracy with economic and social rights as well as with civil and political rights (Teti, Abbott, & Cavatorta, 2019). My own survey of Tunisian civil society documents, various webinars, and Facebook postings, as well as interviews I have conducted in Tunisia since 2013, confirms the preference for a robust social democracy. This is perhaps why Tunisia's public social expenditure in the early years of the democratic transition was relatively high. According to a 2015 World Bank report, Tunisia's total public

social expenditure—inclusive of education, social insurance (retirement, health, minimum income allocation, social services), and subventions—was, at 26 percent of GDP in 2013, considerably higher than in many middle- and high-income countries (World Bank, 2015: 4).[10]

Samia Letaief, an officer of the UGTT also active in the feminist movement, explained in an interview in March 2014 that within both movements "we work for equality of public and private labor law, social insurance for all workers, maternity leave and crèches, healthy workplaces, and against sexual harassment. We want the government to ratify ILO Convention 183 [on maternity protection]."[11] Those goals were shared by the Forum for Economic and Social Rights, which organized a march and rally in Tunis in March 2014, along with the Tunisian Social Observatory, the UGTT, and the two long-standing feminist organizations ATFD and AFTURD. Similarly, Nadia Chaabane, a member of the National Constituent Assembly representing the left-wing El Massar party, stressed the importance of socioeconomic rights:

> We need social insurance for all citizens and infrastructural development in the interior—roads, schools, and so on—so that people in the interior don't have to leave it for the cities; this is part of the state's responsibility. We don't need to rely on private investment and especially not on foreign investment because we had that in the past and it was used in a corrupt manner. We have our own internal resources and they need to be deployed and distributed in an effective and equitable manner. And we need consultation and participation in decision-making; this way we can build the people's confidence in themselves and in government.[12] As she observed: "I like the welfare system of the Nordic countries with its extensive social protection of citizens and the participatory model [*un modèle participatif*] of the left-wing Latin American countries. The future must be more participatory: with the participation of civil society organizations and youth; with transparency, no corruption, and no paternalism."[13] She hoped that Tunisia would not become "like those countries with limited voting. We have seen the deficits of democracy and want to avoid them."

Such participatory and consultative measures were in fact attempted after the work of the Constitutional Assembly ended and new elections took place. A draft law was prepared in 2014 for the creation of a new National Social Dialogue Council. With a rotating presidency, the Council would have tripartite representation by the government (coordinated by the Ministry of Social Affairs), labor unions (represented by the UGTT and other bodies), and the private sector (represented by *Union Tunisienne de l'Industrie, du Commerce et de l'Artisanat*, or UTICA, and other bodies). A new government formed in 2015 was charged with developing the country's first midterm, five-year development plan since 2010. Tunisia's National Development Plan for 2016–21 provided an important platform for financing a unified social protection and labor reform agenda. Democratic consolidation in Tunisia would entail enhancing social protection and labor delivery systems

over the short term and realigning policies on benefits, eligibility, and financing schemes over the medium to long term (Moghadam, 2019). However, the necessary international support—whether in terms of foreign direct investment for job growth or concessionary loans and grants—was not forthcoming. Instead, Tunisia's debt burden increased, unemployment remained high, and informal, non-regular types of work proliferated.

A poll conducted for the U.S.-based International Republican Institute (2017) showed that 68 percent of respondents described the current economic situation in Tunisia as very bad, and a further 21 percent described it as somewhat bad. Some 61 percent felt that the incumbent government was bad or very bad at creating jobs. Fully 83 percent felt that the country was heading in the wrong direction. And while there was widespread support for democracy in principle, 41 percent said that economic prosperity was "definitely more important" and a further 21 percent deemed it "somewhat more important." Tunisian respondents to the wave IV and wave V Arab Barometer surveys considered the economy to be "very bad." In 2019, 48 percent of respondents identified "economy" as "the most important challenge facing Tunisia today"; a majority (56 percent) of young people said they wished to emigrate (Arab Barometer, 2019: 4, 11).

Despite the continued political economy challenges, the UGTT and UTICA in 2017 jointly produced a "decent work" program, *Le contrat social: Un exemple innovant de Programme par Pays pour le Travail Décent (PPTD) pour la Tunisie 2017–22*, which addressed industrial relations and decent working conditions, employment policies and vocational training, social security, income and wage policy, collective bargaining, and regional development policy. And in April 2021, the government of Prime Minister Hichem Mechichi and the UGTT signed a joint agreement to launch reforms in seven state enterprises (including Tunis Air) and in the subsidy and tax systems. This "historic agreement on important battles" was meant to prevent further crippling loans and IMF impositions. According to the press release, Mechichi reaffirmed commitment to preserve state enterprises and not to cede them to the private sector as they were, according to him, the state's treasures. For his part, the UGTT leader Noureddine Tabboubi called for reform of the tax system toward more social justice, and he criticized the lifting of subsidies for some food products such as oil and sugar.[14] This agreement, however, could not prevent the presidential "coup" of July 2021. Nor did it prevent the request for additional IMF financial assistance in 2022, $1.9 billion in a forty-eight-month arrangement (IMF, 2022). A World Bank study notes the 'lost decade for growth' after 2011, government inability to meet citizen aspirations for more and better jobs despite poverty reduction through social transfers, the effects of the COVID-19 pandemic, and the country's growing indebtedness (World Bank, 2022). It makes no mention of a small, fledgling Arab democracy's need for international economic support.

CONCLUSIONS

The Arab Spring protests began in the momentous year of 2011, which also included the European anti-austerity protests in the summer and Occupy Wall Street in the autumn. Rising prices, informality, unemployment, and growing income inequality were problems even before the COVID-19 pandemic. Perversely, wealth concentration increased after COVID-19, not only in the United States but also in Arab countries (Abu-Ismail & Hlasny, 2022). In August 2021, the IMF allocated $650 billion of new "special drawing rights" (SDRs), a quasi-currency used to augment countries' foreign exchange reserves. But because SDRs are allocated based on what each member-state contributes to the Fund, most of the SDRs went to core countries, such as the United States and Germany (Ellmers, 2021). Tunisia and other medium- or low-income members hardly benefited. In 2022, the Russia-Ukraine-NATO conflict exacerbated food and fuel shortages and rising prices. Economic challenges and interstate rivalries are indicative of the structural crisis that world-systems scholars discuss. As Immanuel Wallerstein (2013: 35) noted, the world-system has veered so far from equilibrium that it is unlikely to return.

Tunisia's travails exemplify the deficits of an international system predicated on a flawed economic model and pretenses about what democracy can deliver under such economic conditions. But there is no end to the same flawed policy advice: ending subsidies, reducing the cost of labor, upgrading employment regulations, limiting the public sector wage bill (see, e.g., OECD, 2018: 3; World Bank, 2021, 2022). In contrast, scholars more sympathetic to Tunisia's travails call for more external assistance, especially from the EU: "National development banks as well as the European Investment Bank and the European Bank for Reconstruction and Development should provide further favourably conditioned loans for Tunisian public and private investment. . . . The EU should unilaterally liberalise trade with Tunisia, particularly for agricultural products. . . . Tunisian companies [should obtain] immediate access to the EU market [with] Tunisia opening its own market only gradually" (Weilandt, 2018: 215).

An even more assertive perspective was provided by former member of the Constituent Assembly Nadia Chaabane: "We must be more creative in our solutions, for example, create employment in the context of sustainability, such as advancing renewal energy."[15] Chaabane's comments on renewable energy were echoed by Tunisian scholar Larbi Sadiki (2019), who promotes "Greening Development." Tunisia's government, he writes, must try to reverse environmental degradation coupled with the spread of chronic diseases resulting from chemical production and mining:

> The central government must commit to offering serious compensation to mitigate the consequences of multiple marginalization. To do so, it must collaborate with deprived regions and the international donor community to promote inclusive

> development practices. The aim should be to seek assistance in cultivating self-regenerating regional development; political decentralization that helps ensure greater regional representation at the national level; and clean air and energy systems. Such policies will also help stop environmental and health degradation caused by uneven postcolonial development that is detrimental to man and nature. (Sadiki, 2019: 8)

There is merit to the argument for more EU support for Tunisia's democratic development. There is no evidence, however, that the EU and the United States will work toward a global political economy of a new type, predicated on the redistribution of wealth and more transnational solidarity. At this writing (May 2023), all Western eyes remain fixated on Ukraine's plight, generosity to Ukraine appears boundless, and Western military spending is on the rise. Neoliberal globalization as a system of interconnectedness with the promise of uplift has turned into its opposite, and it has failed to provide conditions for sustained—let alone sustainable—democratic development.

NOTES

1. On rising bread and fuel costs, see *The Economist* (2022a, 2022b).

2. For details on the making of the Washington Consensus, see Babb (2009). For details on the key features and consequences of this neoliberal capitalist model, see Harvey (2007).

3. The two feminist organizations: *Association tunisienne des femmes démocrates* (ATFD) and *Association des femmes Tunisiennes pour la recherche sur le développement* (ATFURD). Following the collapse of the USSR and the communist bloc, the Tunisian party changed its name to *Tadjdid* (Renewal).

4. See also *Jeune Afrique*, no. 3102, July 2021, "Out of Africa," 124–25. A decade-long wave of departures of enterprises, mostly foreign, occurred because of political and economic uncertainties.

5. The bulk of Libyans' bank accounts in Tunisia were funded by wages, including payroll transfers from the Central Bank of Libya (CBL) to Libyan state employees residing in Tunisia, and salary transfers from private sector employers.

6. In 2020, Tunisia's unemployment rate was 16.7 per cent. See "Employment in Tunisia—Statistics & Facts," Statistica, www.statista.com/topics/8902/employment-in-tunisia/, accessed April 2, 2022.

7. Sidi Bouzid is where the self-immolation of fruit-seller Mohammed Bouazizi in December 2010 sparked the Tunisian uprising.

8. See "Tunisia Seeks Late Debt Payments as Crisis Hits Economy, State Budget," Reuters, July 13, 2020, https://www.reuters.com/article/us-tunisia-economy-2020-idUKKCN24E18V.

9. Personal communication from a UGTT health sector official; see also "As Tunisia Declares 'Victory' over Virus, Healthcare Workers Strike to Demand Reform," *The New Arab*, June 19, 2020, https://www.newarab.com/news/tunisian-healthcare-workers-strike-demand-reforms?amp.

10. Even not counting subventions (7 percent), Tunisia's social spending, at 19 per cent of GDP, was higher than that of Mexico (14 percent), Turkey (16 percent), and Chile and Korea (17 percent).

11. Author's interview with Samia Letaief, Tunis, March 4, 2014, at AFTURD Espace Tanassof.

12. Nadia Chaabane, personal interview, March 6, 2014, National Assembly, Tunis. A representative of El-Massar, she was also a member of the *Commission des instances constitutionelles* (covering corruption and effective governance). A dual national (French-Tunisian), she had been active in the antiglobalization movement and close to ATTAC (which called for a tax on financial speculation) but returned to Tunisia in 2011 to take part in the democratic transition.

13. Nadia Chaabane interview.

14. "Gov't, UGTT Ink Joint Agreement to Launch Reforms in 7 State Enterprises, Subsidy and Tax Systems," Agence Tunis Afrique Presse, April 1, 2021, www.tap.info.tn/en/Portal-Society/13848744-gov-t-ugtt-ink.

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3

Nostalgia in Times of Uncertainty

(Re)articulations of the Past, Present, and Future of Globalization

Yanqiu Rachel Zhou

ABSTRACT

Taking the United Kingdom, the United States, and China as cases, this chapter explores the transnational connections of the rhetoric of nostalgia—or, more precisely, what Roland Robertson (1990) calls "willful nostalgia"—in the current phase of globalization. Analyzing these cases through a lens of global studies enables an understanding of nostalgia both as a response to the paradoxes—such as between the compressed world and the intensified distinctions of clusters of nations, between integration and retreat, and between globalization and deglobalization, generated by the globalization processes—and as a multifaceted construct associated with geotemporality, affect, politics, culture, and history. I contend that the divergent rhetoric of nostalgia reflects these countries' different empirical stages and experiences of globalization and (re)articulations of the places to which they aspire in the future world. While the willful nostalgia under discussion has revealed the continuing tensions among nation-states, citizens, international relations, and humanity in the context of accelerated global capitalism, the conflictual and mutually constitutive relationship between globalization and nostalgia are also important to consider.

KEYWORDS

China, future, globalization, nostalgia, the United Kingdom (UK), the United States (U.S.)

In recent years nostalgia—exemplified by the "Global Britain" Brexit slogan, the Trumpian "Make America Great Again" (MAGA) in the United States, and the "Chinese Dream" under Xi's leadership—has become visible across political

regimes and geographies. The rise of nostalgia as a public sentiment, an articulation relating to time (not necessarily linear), and as a tool of political manipulation in an era of uncertainties (e.g., economic, political, public health, and environmental) raises questions about the relationships between globalization and nostalgia. Taking the United Kingdom, the United States, and China as cases, this chapter explores the transnational connections of the rhetoric of nostalgia—or, more precisely, what Roland Robertson (1990) calls "willful nostalgia"—in the current phase of globalization. Seeing nostalgia as a site of articulation comprising both discursive constructions and contestations among multiple forces (e.g., historical, economic, cultural, and ideological), I also attend to how the national temporalities and imaginaries of globalization are narrated and interconnected, as well as to their implications for the future of globalization.

Analyzing these cases through a lens of global studies that pays close attention to the local-global continuum imbued with fluidity, diversity, and complexity (Darian-Smith & McCarty, 2017), the conceptual framework of this chapter, discussed in the first section, draws on theories on the relationship between globalization and nostalgia. It enables an understanding of nostalgia both as a response to the tensions—such as between the compressed world and the intensified distinctions of clusters of nations, between integration and retreat, and between globalization and deglobalization—generated by the globalization processes and as a multifaceted construct associated with geotemporality, affect, politics, culture, and history.

Guided by this framework, I then present the storytelling about nostalgia in these three countries in the section that follows. Specifically, the United Kingdom's case illustrates how the history of the Empire has shaped both the meanings of its European Union (EU) membership and imagination about its post-Brexit future by relying on its transatlantic (colonial) ties for a "Global Britain." The "America First" rhetoric in the United States during Trump's era symbolizes both its erosion of multilateralism, a foundation of contemporary globalization, and a (wishful) return to the imagined past by neglecting the intensifying inequalities rooted in neoliberalism in the present. In contrast, China's selective memories about the (ancient) Silk Road—a story of preglobalization cosmopolitan connectivity—aim to legitimize its geopolitical expansions and pursuit of an alternative globalization that parallels the Western-led global order.

I contend that the divergent rhetoric of nostalgia reflects these countries' different empirical stages and experiences of globalization and (re)articulations of the places to which they aspire in the future world. Despite its ostensible simultaneity on a global scale at this historical moment, the willful nostalgia under discussion should not be simplified as a global trend of local resistance toward globalization. A further nuanced analysis needs to be directed to individual countries' respective geotemporal dynamics—such as the changes in power, social relations, and structure of feeling across times and places—in the long course of globalization (and not limited to contemporary globalization).

CONCEPTUALIZING THE RELATIONSHIP BETWEEN GLOBALIZATION AND NOSTALGIA

In its contemporary usage, nostalgia refers to an emotional reaction characterized by a sense of loss, dislocation, and/or "homelessness" (Bonnett, 2015; Davis, 1977: 415; R. Robertson, 1992; B.S. Turner, 1987). In their writing on nostalgia as a sociocultural discursive construction, Bryan S. Turner and Georg Stauth (Turner, 1987; Stauth & Turner, 1988) identified four major components of the nostalgic paradigm: the idea of historical decline, a sense of the absence of personal wholeness and moral certainty, a sense of the loss of individual freedom and autonomy, and the feeling of the loss of personal expressivity and emotional spontaneity. As a response to identity disturbance or discontinuity, nostalgia can be used as the means at our disposal for holding on to, reaffirming, and reconstructing our identities through, for example, searching for familiarity and certainty in the past (Davis, 1977, 1979). In this sense, nostalgia is less about place than about time: in particular, a perceived or imagined "golden age" in which the gulf between past and present can be bridged, one's desired self can be accommodated, and there is no longing for any other time-space (Tinsley, 2020).

Seeing globalization as a primary root of nostalgia, Roland Robertson (1990, 1992, 1995) is one of the few who have discussed the relationship between them. According to him, the "take-off" phase of globalization (i.e., 1870–1925) witnessed a number of important changes, including the development of various communication means, of international agreements, and of global institutions concerning the world-as-whole, such as the standardization of World Time and the global popularity of the Gregorian calendar. Those technological, economic, institutional, social, and cultural transformations not only provoked a feeling of estrangement or of "homelessness" in individuals; more importantly, they generated willful, politically driven nostalgia as a form of cultural politics—as well as the politics of culture—within nation-states facilitated by the considerable concern across the world with national identity and national integration (R. Robertson, 1990).

Capitalist modernity in the twentieth century involved the homogenizing requirements of the modern nation-state—such as the production of standardized citizens—in the face of local ethnocultural, as well as religious, diversity. This generated the tensions between the universalization of national (and other) particularism and the expectation of the uniqueness of identity, as well as geo-temporal distinctions between clusters of nations (R. Robertson, 1992). Despite great variations in the intensity and type of concerns with the past, willful nostalgia was widely observed during that period, from North America to Europe and Asia. While nostalgia in Japan, an emerging economy in Asia and a newcomer to international society back then, was about consolidating "national essence" and strengthening its "unique" identity against the outside world, for example, what

dominated Germany's sociological ideas then was remarkable pessimism about the future and modernity in general (R. Robertson, 1990).

Robertson (1990) argued that nostalgic resistance to globalization would persist, given the continuing changes of the four interdependent components of the global space. Specifically, nation-states are simultaneously experiencing both external and internal pressures to reconstruct their collective identities in the context of increasing heterogeneity and diversity; individuals are increasingly subject to competing ethnic, cultural, and religious reference points; the world system of societies (international relations) has become increasingly multipolar and fluid; and the idea of a common humanity, or of humankind as a species, is being subjected to contested thematization and scrutiny. In the current phase of globalization, nostalgia has become both collective on a global scale and directed at globality itself, given the very fluidity of global change (R. Robertson, 1992). Compared to the willful, synthetic nostalgia that is an ingredient of the cultural politics in the take-off phase of globalization, contemporary nostalgia is both more economic and more cultural, in the sense of being a major product of transnational capitalism (R. Robertson, 1990).

In Neil Brenner's eyes, however, Roland Robertson's analysis—in particular, his conception of space—"reproduces a state-centric image of global space as a timeless, territorial framework that contains historicity without itself evolving historically" (Brenner, 1999: 55). Instead of treating globalization as a static situation or a terminal condition, he conceives it as "a conflictual reconfiguration of social space that unfolds simultaneously upon multiple, superimposed geographical scales" (60), and as an ongoing process in which the spatiality and temporality of social relations is continually produced and transformed based on the extension, restructuring, and acceleration of global capitalism. While this significantly challenges the role of the nation-state as an enclosed container of socioeconomic relations, globalization and nationalization have historically proceeded in tandem as mutually constitutive processes of sociospatial restructuring (Brenner, 1999). In a time of multiple, accumulating crises (e.g., financial, democratic, refugee, public health, and climate), however, resorting to willful nostalgia or a romanticized version of the past not only masks the deep socioeconomic divisions in these societies; it also distracts people from engaging with the present, and from aspiring to and imagining a viable future without insularity and fear (Novack, 2017).

In short, while nostalgia is rooted in the "time-space compression" that resulted from globalization and is part of the "global-human condition" (Harvey, 1990; R. Robertson, 1992), globalization itself is also continuously reconstituted by such a highly conflictual dynamic. In the next section I explore the complex dynamics embedded in the rhetoric of nostalgia, through which the story about globalization as a multiscalar, historical process of deterritorialization and reterritorialization is (re)articulated in each of the three selected country cases.

THE THREE CASES

The UK: Brexit and Global Britain

The debate around the 2016 Brexit, with its keynote themes of immigration, "sovereignty," and free trade, was really about Britain's place in a world in which its global influence has been in decline. In the 1950s the Suez crisis, for example, not only damaged the country's imperial confidence; it also exposed the limits of its ability to act independently of the United States, an emergent hegemon in the postwar order (Reiss, 2021). Although the United Kingdom's entry into the EU's predecessor, the European Economic Community, in 1973 was in part about its attempt to exert its influence within the growing European Community, over time its membership was increasingly viewed, especially by Eurosceptics, as a symptom of its decline and loss of privilege, and a threat to "Britain's historical narrative of the self" (Beaumont, 2017: 380; Saunders, 2020). In an extreme version, the victory of the Leave campaign was declared by UKIP leader Nigel Farage as the country's "independence day" (BBC, 2016). Seeing that that "identity" mattered as much as economics, Paul Beaumont argues that a nostalgic vision of what made Britain "great" in the past—Empire and World War II—has provided fertile ground for the long-term Euroscepticism that enabled Brexit, which can be understood as "a radical attempt to arrest Britain's decline by setting sail for a future" (2017: 379).

In the context of the Brexit debate, Theresa May, then prime minister, also relaunched "Britain" as "Global Britain" (Selchow, 2020). Presented as an alternative to the EU after Brexit, Global Britain is framed by the UK government as both the story of Britain escaping the confinement of the EU "prison" and a grand strategy to renew a global leadership role in the "new," post-Brexit world (Daddow, 2019). This rhetoric brings together two ostensibly contradictory yet interconnected visions: an imperial longing to restore Britain's place as primus inter pares, which was built upon colonial conquest and hierarchy, and an insular, Powellite narrative of the islands' retreat from a "globalizing" world that is no longer recognizably "British" (Virdee & McGeever, 2018). While some scholars criticize Global Britain as a vision of "Empire 2.0," others have sharply pointed out that the idea is less about the United Kingdom's global consciousness than about a rhetorical strategy to downplay its colonial past, to detach it from the stigma of empire, and also to minimize the significance of decolonization (Saunders, 2020; Selchow, 2020; O. Turner, 2019). In other words, it was not a "narrative of empire", but a narrative of greatness, the distinctive identity of Britain as a small but heroic nation that once "ruled the world" (Beaumont, 2017: 380; Saunders, 2020).

The amnesia—manufactured by conflating imperial nostalgia with its positive global aspiration—inherent in the Global Britain rhetoric may indeed have contributed to its ability to attract Brexit supporters from a wide range of social, economic, and political spectrums. Although the typical Brexit voters are often described as those who are white, older, less educated, and poorer, for example,

many younger voters (about one-quarter of 18–24s and over one-third of 25–34s), people with university degrees (slightly over two-fifths), and a significant portion of ethnic minorities (one-third of Asian voters and one-quarter of Black voters, among others) supported Leave (Ashcroft, 2016; Martill & Rogstad, 2019; Mintchev, 2021). Although hostility to immigration and multiculturalism is one of the characteristics associated with a Leave vote, the enthusiasm for Commonwealth—which may mean white "Dominions" for some, and the multiracial states of the "new" Commonwealth for others—is simultaneously palpable. Attributing the Black and Asian votes to the difficulty in differentiating between Commonwealth and imperial loyalties, Robert Saunders further argues that the legacies of empire—as it manifested in the Global Britain discourses and critiques—are a common cultural inheritance affecting all sides of the Brexit debate, rather than "a disorder to which only half the population is subject" (2020: 1140).

Although the divide between the winners and losers in globalization, exemplified by the increasing socioeconomic inequalities, was a key driver of the vote (Martill & Rogstad, 2019), its highly divergent geotemporal dynamics—another result of globalization—also merit a nuanced understanding. At a national level, the United Kingdom's four countries (England, Northern Ireland, Scotland, and Wales) have different experiences of migration, political sovereignty, and economic policy; and their trajectories of support for Leave and Remain are also different (Mintchev, 2021). St. Andrews, a seaside town in Scotland (which voted to Remain), for example, is a place where "everyday life has for decades been defined by cosmopolitanism," which has been "a cornerstone of previous temporalities of Scottish European belonging," but now is suspended by the UK's Brexit vote (Knight, 2017: 238). The vote to Leave in the town of Margate (in England) was enabled by the attachment of its residents, even the economically well-off, to a shared working-class history (including pride in their ancestors' participation in World War II and local histories of manufacturing) that was seen as marginalized from a mainstream political culture (Balthazar, 2017). The complex geotemporal dynamics are also clear in London: while this global city predominantly supported Remain, "left-out" working-class people in East London voted the opposite as a way of expressing their anger toward decades of poverty and political invisibility (Mckenzie, 2017).

During the Leave campaign, terms such as *CANZUK* and *the Anglosphere* gained currency. While CANZUK refers to a union of Canada, Australia, New Zealand, and the United Kingdom, the Anglosphere is a broader conception of uniting English-speaking polities around the world (Bell & Vucetic, 2019; Gamble, 2021; Wellings & Baxendale, 2015). The ideas can be traced back to Charles Dilke's *Greater Britain* (1868), in which he characterized Britain as the center of a world system bound together by a common identity—mainly racial (i.e., the Anglo-Saxon race), but also cultural and linguistic—or what Penelope Edmonds (2009) calls "trans-imperial Anglo-Saxon exceptionalism" (Kennedy, 2021). While

the rhetoric appeared effective to mobilize sizable clusters of the British populace by instilling a (false) sense of hope and renewal, it has also bolstered populism, ethnic nationalism, racism, prejudice, and homophobia in society, given its deep entanglement with the politicization of "culture" and national identity (Koegler, Malreddy, & Tronicke, 2020; Mondal, 2020; Virdee & McGeever, 2018).

In reality, however, resorting to a late-Victorian imaginary centered on the integration of Britain and its white settler colonies can never be a viable alternative to European integration, especially when it comes to trade and security (Dougall, 2023; Gamble, 2021; Steel, 2015). Despite its aims to restore its global influence in the world and its globalist outlook, at the heart of Global Britain are actually bilateral agreements (with individual countries) to compensate for the loss of EU ties (Major & von Ondarza, 2018). In a world where Russia's threats and China's power are growing, the United Kingdom may indeed be forced to concentrate more on Europe (Major & von Ondarza, 2018; Reiss, 2021). Seeing Global Britain as a *domestic* rather than an international narrative, Oliver Turner (2019) argues that the narrative constitutes an actively problematic component of the United Kingdom's foreign policy, given its inherently regressive worldview. Against the interests of Brexiters and their aspirations, as well, the UK's postimperial decline is likely to continue due to loss of the structural advantages accrued by European economies (Mondal, 2018).

The US: MAGA and America First

Since the 1970s, American hegemonic power has been contested or at the very least under challenge due to various international and domestic conditions, including the Vietnam War, massive loss of manufacturing jobs, large trade deficits (especially with China), the 2008 Global Financial Crisis, and even the recent COVID-19 pandemic. Take job loss and international trade, two interconnected hot topics pertinent to both globalization and the 2016 election. From the early 1980s to 2015 the United States' share of global manufacturing declined from nearly 30 percent to 18.6 percent, and its manufacturing jobs fell from almost 19 million to just over 12 million (Federal Reserve Bank of St. Louis, n.d.; Levinson, 2018).

During the 2016 election increasing socioeconomic divides and polarization, consequences of neoliberal globalization, were a palpable contributing factor to Donald Trump's victory. For example, the Rust Belt, a region that experienced industrial decline since the 1980s and played an unexpected role in Trump's victory, was one of the targets of his rhetoric of nostalgia (Mutz, 2018). Many voters there strongly responded to his popular message of "Make America Great Again" (MAGA), in which he promised to bring manufacturing jobs back by stimulating its economy through deregulation, new trade deals, and a reversal of many of the energy policies of Obama and his other predecessors (Van Winkle, 2020). Despite the fact that some jobs have been permanently lost to technologies, the affective nature of MAGA rhetoric was especially appealing given these voters' desire for

a past in which they were viewed as valuable to the country's industry, culture, and politics (James, 2018; Van Winkle, 2020). Although Trump's success was often attributed to the support of those who were "left behind" economically, Diana C. Mutz argues for the importance of "status threat" felt by the dwindling proportion of traditionally high-status Americans (i.e., whites, Christians, and men) and by those who perceive the United States' global dominance as threatened in the contexts of growing domestic racial diversity and global economic competition. In her words, "The 2016 election was a result of anxiety about dominant groups' future status rather than a result of being overlooked in the past" (2018: E4338). While such a sense of loss (of one's status in the domestic or international hierarchy, for example) is nothing new, this sentiment was highly politicized through the course of the 2016 presidential campaign.

Seeing the loss of authenticity (i.e., "true" Americanness and nationhood) as a core of the United States' decline, Trump's supporters are particularly proposing the need to return to a past in which an "ideal" status hierarchy or social order built on Christianity and race prevailed (Mayne, 2018; Mutz, 2018). Despite variations in their framing of how religion and race intersect—by using either white supremacist or color-blind language when talking about ideal Americanness and American history, for example—as markers of American belonging and power, Ruth Braunstein (2021) argues that a wide range of right-wing movements are bound together by their adherence to a nostalgic vision of the United States as a Christian nation. Although the temporal specificity of the golden age appears vague in these narratives, its relational future is clear. That is, it is an age, or time-space, in which heterosexual, white, Christian men had a monopoly on social and political power, and in which the now-lost moral virtues and religious values that are essential to the "authentic Americanness" should be revived and recaptured (Al-Ghazzi, 2021; Braunstein, 2021; Murphy, 2009). Such a singular and essentialist articulation of Americanness through a distorted past became a base for Trump to mobilize and consolidate power against his political opponents (Gul, 2021; Tinsley, 2020: 2354).

As pointed out by Michael Mayne, white nationalism and the rhetoric of nostalgia share three elements of *doxa* (i.e., self-evident truth): authenticity, home, and restoration. To legitimatize a return to an imagined home where "the present has degenerated into a cosmopolitan amalgamation," however, further rhetorical components are also indispensable (2018: 85). Through his speeches over time Trump has compiled a long list of enemies and historical humiliations, ranging from the democratic elite and the media to Muslims, Mexicans, and China (Al-Ghazzi, 2021; Braunstein 2021). Making self-victimizing claims creates "a chain of equivalent binaries" between *us* as the patriots, faithful and authentic, versus *them* as the traitors, faithless and intruders, and solidifies the divisions in a pluralist society, both of which are central to popularistic discourses (Al-Ghazzi, 2021: 47). More importantly, as pointed out by Omar Al-Ghazzi, "projecting victimhood

onto meta-historical narratives about a conflict between victims and oppressors allows for imagining the trajectories of communities along a 'zigzag' historical timeline, wherein the present is portrayed as a juncture similar to fateful junctures in the past" (2021: 46). Positing the United States, like Europe, as lost to the waves of (nonwhite) immigration, for example, its future becomes an existential crisis for its historical glory, its identity, and even its civilization. In Trump's (2017) words, "The fundamental question of our time is whether the West has the will to survive." Confronting the stark choice between its "tragic decline" and MAGA, accordingly, Trump is portrayed as the leader, the hero, and the embodiment of his supporters (as the hijacked "American people") whose destiny is to direct the zigzag structure (of the desired emotion and memory) into the right direction and time-space (Al-Ghazzi, 2021).

The intersection of identity and nostalgia also applies in U.S. foreign policy. On a discursive level, America First is a mixture of American exceptionalism and historical amnesia (Braunstein, 2021; Löfflmann, 2020). The rhetoric of MAGA is underpinned by the historical construction—not just by Trump—of the United States as "a City upon a Hill" or a "unique," superior, singular, and "God-favored" country, which is integral to its grand strategy in a post–Cold-War world (Löfflmann, 2020). In this "forked historical consciousness," however, there is little acknowledgement of its associated dark history. As a code for nativism and white nationalism, according to Sarah Churchwell (2018), America First, which Trump repeatedly employed in his inaugural speech, is a phrase and ideal historically entangled with the country's brutal legacy of slavery, xenophobia, and isolationism, exemplified by its early appearance in 1884 as a slogan to fight trade wars with the British and the America First Committee formed in 1940 by a coalition of Americans against U.S. entry into World War II. On a practical level, the Trump administration's retreat from multilateralism—exemplified by its role in eroding the World Trade Organization (WTO) and its withdrawal from the World Health Organization and the Paris Agreement—not only contributes to and reinforces the multiple real crises faced by the world in the present; it also endangers the system of "the liberal world order" in the future (Larik, 2018; Löfflmann, 2020).

Neither antiglobalization (including anti-immigration) sentiments nor economic protectionism is new in the history of the United States (James, 2018; Park & Stangarone, 2019); but the recent victory in American politics (and in the United Kingdom and China, as will be discussed) of the identity-policy nexus of willful nostalgia, or the political manipulation and exploitation of collective nostalgia, represents a dangerous trend. The intersection of nostalgia and popularism not only constrains the possibilities for exploring and promoting an alternative, progressive American jeremiad about the past (e.g., epitomized by the thought of Abraham Lincoln and Frederick Douglass)—not without paradoxes, of course (Murphy, 2009). It also misdirects public attention and political actions away from the very present, troubled by intensified socioeconomic inequalities, toward the

scapegoated Others (e.g., racial, ethnic, religious, and sexual and gender minorities) in the names of patriotism and a "great" future for the country (Braunstein, 2021; Mayne, 2018).

China: The Silk Road and the Chinese Dream

The goal of the official rhetoric about the Chinese Dream of Great Rejuvenation, initiated by the Chinese Communist Party (CCP) government after the accession to leadership of Xi Jinping in 2012, is to sustain the country's rapid economic growth and enable it to join, or even surpass, the wealthy countries of the world (Carrai, 2021; Whyte, 2020). In the following year China announced its Belt and Road Initiative (BRI), a global infrastructure development strategy with two components: the Maritime Silk Road Initiative and the Silk Road Economic Belt (Blanchard & Flint, 2017). Departing from the low-key stance that his predecessors had pursued since China's Open Door policy (introduced in 1978), Xi's adoption of an explicitly outward-looking foreign policy also reflects the CCP's growing confidence in global affairs. In 2008 China, which was largely immune to the blows of the Global Financial Crisis, surpassed Japan to become, at around $600 billion, the largest holder of U.S. debt (BBC, 2010). In 2011 the U.S. trade deficit with China rose to an all-time high of $295.5 billion (CFR, n.d.). In its *World Development Report 2012*, the World Bank (2011) for the first time ranked China an "upper-middle-income country" (UMIC); only a decade before, it was still a low-income nation. This spectacular rise, no less than its tragic decline before, requires (re) articulation for both domestic and global audiences.

The narratives of ancient Silk Roads are neither novel nor static, however. Western audiences are familiar with the term through, for example, the work of Ferdinand von Richthofen, a German geographer and geologist who first proposed it in the 1870s to refer to the East-West connectivities emanating from Han dynasty China, as well as Steven Hedin's *The Silk Road* (1938). With the intention of reducing hostilities, the concept was also embraced, and broadened, by post–World War II Japan to emphasize the mutual benefits of centuries of exchange and peaceful dialogue between Japanese civilization and other cultures and societies, and later by UNESCO for its decade-long multilateral initiative Silk Roads: Roads of Dialogue at the end of the Cold War (Winter, 2019, 2021). Seeing the Silk Roads as one of the most compelling geocultural concepts of the modern era, Tim Winter (2021) argues that this strategic concept enables China to present itself as a civilizational state in order to build regional and continental connectivities through BRI as a new way of imagining both its past and a new future to come.

In the context of BRI, the Silk Roads—through various activities such as museum exhibitions, filmmaking, art performance, and heritage-making—have become a remarkably elastic concept to tell stories of trade, exchange, cooperation, friendship, prosperity, and cosmopolitanism (Benabdallah, 2021; Thorsten, 2005; Winter, 2021). In these narratives the Tang Dynasty (618–906 ad), the borders of

which expanded far into Korea and central Asia, is portrayed as the highest point of Chinese civilization, a model for imperial rule, and a golden age of cosmopolitan culture (Fong, 2020). Employing computer-generated imagery (CGI), as well, a documentary titled "Maritime Silk Road" created a historical nostalgia both to help present the BRI to the countries of Southeast Asia and to instill a sense of diasporic nostalgia for the overseas Chinese (Gu, 2018). In 2020 the legacy of Zheng He, a Muslim Chinese admiral and navigator of the Ming Dynasty (fifteenth century), was promoted by the state-run media as a symbol of China's harmonious relations with Indian Ocean states through his having forged links between Taicang (a city in China) and cities in Malaysia, Indonesia, and Kenya (Benabdallah, 2021). The fluidity—also reflected by chosen glory and amnesia—between time and space in nostalgia serves as both a vehicle and a demonstration of China's geocultural power: that is, its capacity "to write and map geocultural histories, steering which events, places and people are assembled into strategically expedient narratives" (Benabdallah, 2021; Carrai, 2021; Winter, 2021: 1393). According to Winter (2021), such power is not so much territorial, but nodal, weaving together a multitude of locations, events, and actors along certain routes across times and spaces.

Romanticizing the Silk Roads as a story of "our lost civilization" and of premodern globalization is integral to China's narration about its "dream" and place in the world (Thorsten, 2005: 301; Winter, 2021). The story expresses nostalgia for a time when universalism—in such forms as common humanity, connectivity within and beyond Asia, and "global community"—was a norm (Thorsten, 2005). Recalling past splendors as a precedent, it naturalizes and legitimatizes China's geo-economic and geopolitical expansion and "return" to the center in global commerce and multisector connectivity as a form of historical continuity (Benabdallah, 2021; Carrai, 2021). The expanded Chinese exceptionalism—a millennial civilization portrayed as historically global and "inherently peaceful" despite its violent imperial history—also helps present it as a unique and, indeed, better alternative to the U.S.-led global order (Callahan, 2017). In this light, framing its present engagement with the world (especially in Asia, Africa, and Latin America) in a language of openness and inclusivity—for example, "[The BRI] originated in China, but it belongs to the world"; and, "We can embark on a path leading to friendship, shared development, peace, harmony and a better future"—enables an imaginary going beyond Western-led globalization and the confinement of the past and the present of globalization (cited in Benabdallah, 2021: 302, 294). Despite its globalist and allegedly conflict-free rhetoric, however, BRI on the ground—involving bilateral relations with many weaker states—is imbued with tensions and challenges.

While the state propaganda of the Chinese Dream is also aimed at domestic politics, its core constituents and messages are articulated somewhat differently than those of its international counterpart. The selected trauma—in particular, China's "century of humiliation" starting with the Opium Wars with Britain in the late nineteenth century—emphasizes its historical victimhood at the hands

of "foreign powers," generating patriotic anxiety about and hope for the nation's future (Callahan, 2017; Carrai, 2021). As well, promoting the combination of the individual dream (for a good life) and the collective dream (for a wealthy and powerful nation in the world) fosters associations between the "self-realization" of individuals and their national belonging, and between nationalistic sentiments and support for the CPP (Callahan, 2017; Hizi, 2019). In this sense, the Chinese Dream of Great Rejuvenation has also been a tool for both nation-building and legitimizing the power of Xi and the CCP. In Xi's (2021) speech on the CCP's one-hundredth anniversary in 2021, for example, the glory of the Chinese Dream was talked about interchangeably with the glory of the CCP. Meanwhile, the rhetoric provides a cognitive and emotional framework in which its political elites and ordinary citizens can interpret the world and create a sense of unity needed to continue both the engagement with global capitalism and the rule of the CCP (Carrai, 2021). Although it is hard to assess how different clusters of population in China have responded to the rhetoric, William A. Callahan (2017) argues that it surely favors those who follow the collective path to the dream, and who also know what they do not dare to dream (e.g., democracy).

CONCLUDING REMARKS

Despite the differences in their articulations, the willful nostalgias of the cases discussed have features in common. First, nostalgia—with its hybrid, multidirectional, affective orientation of time—allows the political leaders in the respective countries to move back and forth in time to bring back the "glorious" past, not even, necessarily, for the sake of the present, but rather for the promise of an imagined future. In a time of uncertainty, sitting at the intersection of time, space, and affect also enables their selective and fluid narrative (re)constructions and political manipulations to shape, contest, and/or consolidate their places in the world (Benabdallah, 2021). Second, identity politics—defining the Self against the Other—has become an important tool with which to create a dichotomous or oppositional trajectory of national belonging and to narrate the nation at the respective turning points of globalization. The idea of a historic juncture at which the nation's future can take a route only of either rising ("a golden age") or falling ("humiliation") is salient in all three cases, encouraging public support for the leaders so as to avoid a dramatic change of course (Al-Ghazzi, 2021; Callahan, 2017). Third, while trade is integral to the rhetoric of nostalgia in all three cases, the politics of culture is also apparent. Culture, according to Jennifer Robertson (1997, quoting Comaroff and Comaroff 1992), can be understood as "a space-time manifold 'in which human beings construct and represent themselves and others, and hence their societies and histories'" (J. Robertson, 1997: 98). This protean quality is confirmed in Roland Robertson's argument about the importance of economic and cultural aspects of nostalgia, where "the very fluidity of global change has invited [. . .] nostalgia for

secure forms of 'world order,' as well as a kind of projective nostalgia for the world as a home" (R. Robertson, 1992: 162).

Meanwhile, the simultaneity and seeming paradox of their respective state-centric or nationalist articulations and consciousnesses about the world in the rhetoric of nostalgia merit a more nuanced attention, given the different geotemporal dynamics within and among these countries when it comes to globalization (not limited to contemporary globalization) and its effects. In addition to viewing the willful nostalgia as a response to the continuing tensions among nation-states, citizens, international relations, and humanity as resulting from the acceleration of global capitalism (R. Robertson, 1990), the conflictual and mutually constitutive relationship between globalization and nostalgia are also important to consider (Brenner, 1999). Despite the partial retreat of the United States and the United Kingdom—the two leaders and advocates of neoliberal economic globalization since 1978—from the systems of global economic and political integration, the former's "non-territorial empire" (Strange, 1988) and the latter's aspiration to reterritorialize, based on Britain's "imperial circuit of the globe," have also coexisted. As a late participant or newcomer in globalization, by contrast, China has now become a defender of economic globalization—as illustrated by Xi Jinping's (2017) speech at the World Economic Forum in Davos—and an expansionist explorer of an alternative globalization. Although the United States must have wished its present would be China's future—that is, integrating into the Western-led global order—when supporting the latter's participation in the WTO two decades ago (with the decisive help of the Clinton administration), China's trajectory has challenged both the temporal and the spatial status quo (including geotemporal ordering) of contemporary globalization. At a global level, however, these parallel yet contractionary changes appear consistent with Brenner's (1999) conception of globalization as a multiscalar, ongoing process of deterritorialization and reterritorialization. In this sense, a highly divergent and conflictual future of globalization should be expected.

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4

Mobility and Globalization

Habibul Haque Khondker

ABSTRACT

Mobility, viewed empirically as the movement of people, capital, technology, institutions, ideas, ideological systems, and knowledge, is the most visible face of globalization. Mobility is central to the process of globalization marking ageless continuity. Although some writers define the present phase (twentieth and twenty-first century) of globalization as the "age of migration," historical human migration—both involuntary and voluntary—characterized earlier phases of history just as well. The so-called free movement of labor in the present phase of globalization hides forms of slavery and bonded labor that continue to characterize twenty-first-century globalization. An examination of the mobility of people in the first quarter of the twenty-first century will illustrate the seesaw-like tendency of a borderless and bordered world, which reveals the contradictions of globalization with implications for both mobilities of people and dissemination or mobility of scientific knowledge and technology. The present chapter takes an interdisciplinary perspective to examine the intersectionality of mobility and globalization.

KEYWORDS

globality, globalization, knowledge, migration, mobility

The link between mobility and globalization, two key concepts that straddle several social sciences, can be understood in several ways. Studies on both mobilities and globalization combine geographical, sociological, political-economic, and historical approaches. Terms such as *mobility* and *circularity* have been used with great frequency in the discussion of globalization and global history in recent times (Gänger, 2017). Titles such as *connected history* (Subrahmanyam, 1997, 2022), followed by *connected sociology* (Bhambra, 2014), have come into circulation in recent decades. *Connectivity, mobility*, and *globality* have become part of a conceptual

assemblage. A turn to mobility and the emergence of a mobility paradigm took place in the first decade of the twenty-first century (Sheller & Urry, 2006).

Both *globalization* and *mobility* are polysemous terms. The various approaches to globalization are narrowed into two. In one approach, often held by journalists, some economists, and politicians, globalization is viewed as a new label for neoliberal capitalism writ large. In this view, globalization is an enabler of the mobility of people, capital, and technology. Yet the process is not without contradictions. While the advocates of neoliberal globalization applaud the mobility of the professional classes, the mobility of the working class is a source of concern for them. They view unrestricted mobility of capital as a boon since it fuels globalization, but unrestricted mobility of labor might jeopardize political stability, giving rise to xenophobia (Steger, 2003: 118).

A broader, holistic, historically rooted sociological view of globalization views mobility of labor, capital, technology, ideas, religions, ideological systems, knowledge, lifestyles, and cultural products as a natural process that has come to be restricted or moderated by the rise of the states and the ideologies of extreme nationalism. In the present chapter, we adopt a sociological view of globalization and consider mobility in broader terms that include both artifacts and ideas, yet human mobility remains its central component.

Human mobility can be viewed in three broad phases. For millennia of foraging and pastoral living, human mobility was the norm, as life was unencumbered by the boundaries of states or functional equivalents of such organizations. Historically, migration has been the normal condition (Manning, 2005). People migrated in large numbers from Africa to the rest of the world. Asian migrants populated the Arctic and reached North America well before the continental drift. Since the end of pastoral society and with the advent of agricultural societies, people have been largely sedentary, but not immobile, as mobility was limited to seasonal or short-distance migration. With the advent of modernity triggered by industrialization, mobility has become commonplace. Mobility, in that sense, can be seen as a major marker of modernity. The "mobility hypothesis," which was advanced by Wilber Zelinsky (1971) and supported by Charles Tilly (1978), argued that the imperatives of capitalism created mobile free labor through a process of proletarianization. The view that links population mobility to industrialization has come under critical examination (Hochstadt, 1989; Lucassen & Lucassen, 2009).

The debate, to some extent, hinges on the definition and scale of migration. The movement of people from one place to another is nothing new. Historically, there has been a natural flow of people, for example, during harvests, which would be regarded today as seasonal migration. Indeed, people moved from place to place, individually or as a group, for a better life. Emigration to the so-called New World, rural to urban migration, and the movement of soldiers and sailors predated industrialization (Lucassen & Lucassen, 2009). At least in theory, people could move more freely across geographical boundaries until the invention

of the passport and the monopolization of control of the means of movement by the state in the nineteenth century (Torpey, 2000). In Europe until World War I, the movement of people took place quite freely. During and after World War I, as mass travel expanded and borders became more rigorously guarded, the regulation and monitoring of human movement by the state became more determined (Torpey, 1998: 254). At the beginning of the twenty-first century, global citizens traveled a total of 23 billion kilometers; by 2050, that figure will have risen to 105 billion (Schafer & Victor, 2000: 171).

MOBILITY AND GLOBALITY

In the current global circumstances, mobility has become one of the central features of globality. Mobilities of technology, tools, and ideas have a long history. With revolutionary improvements in transportation and communication, a vast number of people around the world have become highly mobile. For certain classes of people, geographical constraints have lost significance, and societies and nation-states have become more permeable. While there is a class dimension to mobility, since only the middle class and upper classes can travel, a growing number of working-class people are also resorting to travel across national boundaries and within their respective societies in search of livelihoods. As such, mobility and migration have become synonymous.

The COVID-19 pandemic, by denting both globalization and mobility, unwittingly revealed the close relationship between the two. However, if globalization is defined in a sociological way, focusing on historical encounters among civilizations, societies, and cultures, mobility becomes a defining feature of globalization. Consider the definition of globalization by Roland Robertson (1992), for whom globalization entails that the world becomes a single place followed by a growing awareness of the shrinking of the world. In this process, mobility is both a cause and consequence of globalization. John Urry (2000), among others, reframed modern society as a mobile society, emphasizing the mobility of corporeal bodies, that is, people, but also a way of life, that is, ideas (Urry, 2002). Corporeal mobility, a distinctive feature of modern global society, was interrupted by immobility caused by the coronavirus pandemic in 2020–21. Even without a huge public health emergency, one cannot overlook the contradictions of the modern world (circa the second decade of the twenty-first century): the co-presence of mobility and the increasingly bordered and fenced nature of the world, which go hand in hand with the advancing march of globalization (Turner & Khondker, 2010).

Mobility, viewed empirically as the movement of people, capital, technology, institutions, ideas, ideological systems, and knowledge, is the most visible face of globalization. Mobility is not only central to the process of globalization, given its historical depth, but it also helps mark the differences in the various historical phases of globalization. Enhancing mobility has become a central feature of

contemporary globalization. At the end of the twentieth century, close to 2.6 billion people traveled by the world's airlines each year (Hobsbawm, 2007: 86). In 2019, a year before the outbreak of COVID-19, the International Civil Aviation Organization's preliminary compilation of annual global statistics put the total number of passengers carried on scheduled services at 4.5 billion (ICAO, 2019). Asia and the Pacific accounted for 34.7 percent of the traffic, while Europe and North America accounted for 26.8 percent and 22.2 percent of the traffic, respectively.

An increase in air travel is a good indicator of both intra- and international mobility. Businesspeople, workers, students, and people traveling back and forth to meet family members in different parts of the globe constitute most of the air passengers. The mobility of students has been an interesting trend in recent decades, especially since the economic reforms in China. An increase in the number of tourists is another aspect of enhanced mobility. In 1896, author Mark Twain landed in Bombay (now renamed Mumbai) and stayed at Watson's, Bombay's leading hotel at the time. His sojourn was part of his global travels that took him to Europe, India, and Australia (Twain, 1897). Tourism can be traced back to the seventeenth and eighteenth centuries, when it was a privilege limited to the nobles, when inns and hotels were being established in various European cities. As the Industrial Revolution unfolded, tourism proper began in the nineteenth century. The first travel agency, Thomas Cook & Son, dates back to the nineteenth century, offering excursions and holidays. Tourism flourished in the twentieth century with the expansion of railway lines, the advent of the automobile, and later planes. Being able to travel, particularly for nonwork reasons, was only available to a narrow elite and was itself a mark of status (Urry, 1990: 24). The frequency of foreign travel prompted Omhae to declare the idea of a "borderless world" (Ohmae, 1989). In 1988, nearly 90 percent of all Japanese honeymooners went abroad.

The World Tourism Organization (UNWTO) estimates that internationally, there were just 25 million tourist arrivals in 1950. Sixty-eight years later, this number has increased to 1.4 billion international arrivals per year. This is a fifty-six-fold increase. Europe accounts for over 51 percent of all the tourists in 2018 (Our World in Data, n.d.). Tourism and travel's direct contribution to GDP globally was approximately US$9.1 trillion in 2019, which dropped to US$4.7 trillion in 2020 due to the COVID-19 pandemic (Statista, 2021).

The precursor of tourism is a pilgrimage where people motivated by religious belief undertook visits to holy sites at a regular interval. Pilgrimage provides continuity in the historicity of globalization. One of the world's largest religious gatherings is at Hajj, where about 2.5 million Muslim pilgrims took part in 2019 (Government of Saudi Arabia, 2019). The Kumbh Mela, considered the most populous pilgrimage, attracts tens of millions of Hindu devotees to dip in the Ganges, defying COVID-19 fears (Srinivas, 2021).

MOBILITY AS MIGRATION

Migration, which is simply the physical movement of people from one place to another, has become the most visible face of globalization today. One cannot ignore the fact that an increasing number of residents of almost every country today are foreign-born, revealing global mobility. Although some writers define the present phase (twentieth and twenty-first century) of globalization as the "age of migration" (Castles & Miller, 1993), historical human migration—both involuntary and voluntary—marked the salience of migration in earlier phases of history just as well. Pitrim Sorokin, a Harvard sociologist and an immigrant from what was then the Soviet Union, used the term *mobility* in the 1940s and differentiated between horizontal mobility, which implied migration, and vertical, or social mobility.

Although human migration is not new, one of the most interesting features of twenty-first-century globalization has been an increase in mobility, where more people tend to move more frequently from place to place. Mobile people include tourists, commuters, and migrants. We differentiate between migrants and other mobile people on the grounds that migrants live for a certain period in a destination country for work, education, or business or to join family members; are subject to the rules, regulations, and customs of the receiving country; and are required to make some degree of cultural accommodation. All modern societies allow free movement of citizens within their national borders and the national laws ensure that they enjoy the freedom to travel. An exception has been the *hukou* system in China, which was an attempt to regulate and restrict internal migration. In recent years, reforms have taken place in the *hukou* system to facilitate industrial production in the coastal cities of the South and Southeast (Zhao & Fu, 2010). Although the system was officially phased out in 2014, this practice is unlikely to be phased out anytime soon (Goodburn, 2014). In premodern Europe, there were restrictions on rural people's ability to move into the cities without work. Vagabondage was a punishable offense in early modern Europe (Kamen, 1986; Perry, 2002).

Migration raises interesting issues about the relationship between market forces and the authority of the state. It is the classic law of supply and demand that dictates the movement of people across national boundaries. However, the state in the receiving countries, in aiding the market forces, usually complies with the dominant economic forces, but the state is responsible for its citizens. The sending states also play a role in sometimes promoting the interests of migrant workers by providing all kinds of assistance or blocking their movement if there are possibilities of workers falling into exploitative situations overseas.

Although there has been a significant increase in the migrant population in recent decades, earlier centuries saw greater mobility of people in terms of percentage of total population and degree of freedom—if not ease—of movement. The last decade of the twentieth century was declared the "age of migration" by

Stephen Castles and Mark J. Miller (2003). Yet the nineteenth century allowed easier migration flows. In the euphoria of discussions on globalization, writers like Kenichi Ohmae (1989), a business thought leader, announced the coming of a "borderless world." It is ironic that when celebratory remarks about the so-called borderless world were being made, walls were being erected in many parts of the world to restrict the movement of people. Contrary to popular perception, in the twentieth century, the world has become more bordered than at any other time in the past. We live in a state-centered world. The contradiction of globalization is best revealed in the free flow of capital and the restricted movement of labor.

The uneven forces of globalization have made the state more central. The relationship between globalization and the state has taken a new turn, making the state more powerful insofar as border control is concerned. The power of the state is often felt in its ability to control and regulate the movement of people, goods, technology, and intellectual property. In the discourses on globalization, several ways of conceptualizing the processes of globalization are available. One of the conceptualizations views globalization as a series of flows: flows of capital, technology, ideas, and population. This view is most relevant in the discussion of mobility. Since the emergence of state systems, migrants can be viewed as either internal or international. Most migrants in the present world are internal migrants, which reflects uneven development within the country, as international migration is rooted in uneven global development. Both internal and international migrants constitute close to one billion migrant workers in the world. Here, *migrant* is defined—minimally—as a person who lives in a place other than where she or he was born. In the world of nation-states, some people move within the country from rural to urban areas or from small towns to metropolitan cities in search of work, education, career enhancement, better living conditions, and so on. They constitute around 740 million people (UNDP, 2009, quoted in IOM, 2015).

The global estimate of international migrants stood around 286 million in 2022, which included 32.5 million refugees in mid-2022 (World Bank, 2022). Overall, the estimated number of international migrants has increased over the past five decades. One hundred ninety-one million people, or 3 percent of the world's population, lived outside their country of birth in 2005, according to the UN Department of Economic and Social Affairs. The equivalent figure in 1960 amounted to 75 million people or 2.5 percent of the world population. Almost one in every ten people living in more developed regions is a migrant. The total estimated 281 million people living in countries other than their countries of birth in 2020 was 128 million more than in 1990 and over three times the estimated number in 1970 (IOM, 2022).

China accounts for the highest number of internal migrants in the world. According to the 2020 census, the floating, or migrant, population—defined as those without local household registration (*hukou*)—has increased to 376 million,

up from 155 million in 2010 (Chan, 2021). Uneven industrialization is the cause of both internal and international migration. In China, internal migration has health impacts, especially on young migrants aged 16–35 (Lu, Kandilov, & Zhu, 2020).

What is unique about migration in the age of globalization is that more and more people are moving to and from more and more countries, and their movements are closely documented and surveyed. Controversies over the undocumented movement of people are an affirmation of the importance of documentation and surveillance. Migration is the result of a complex set of social, economic, political, and cultural processes. There are several types of migration: voluntary, involuntary or forced, and economic or political. Often, a combination of factors drives people to migrate. While migrants exercise their volition in choosing to move, for refugees and internally displaced people, such choices do not exist. COVID-19 restricted the number of people on the move but did not fully restrict mobility. Displacement continued to occur and grow, with 1 in 95 people displaced at the end of 2020, up from 1 in 159 in 2010 (UNHCR, 2022).

CAUSES OF MIGRATION

John Maynard Keynes, the famous English economist, said that "migration is the first act against poverty." According to a United Nations report, three D's account for the majority of migration today: demography, development, and democracy. People tend to move out of so-called overpopulated countries to less populated countries, from less developed to more developed countries, and from authoritarian to democratic countries. Less populated but rich countries such as Canada and Australia remain popular destinations for migrants. While some migrants move permanently, the oil-rich Gulf countries remain destinations for temporary migrant workers. The United Arab Emirates has the highest proportion of temporary migrants, who constitute over 88 percent of the population.

According to Adam McKeown (2004), world migration reached new peaks in the 1920s, and the immigration restrictions of the 1920s were also part of a much longer trend of regulation, border control, and nationalism that had grown concurrently with migration since the middle of the nineteenth century. From 1846 to 1940, there were three main circuits of long-distance migration. During this century of migration, 55–58 million Europeans and 2.5 million from India, China, Japan, and Africa migrated or were taken to the Americas. During the same period, the other main destination was Southeast Asia, the Indian Ocean Rim, and the South Pacific, where 48–52 million Chinese from China and Indians moved.

In the twentieth century, alongside forced involuntary migration caused by war, voluntary migration grew enormously. At the beginning of the twenty-first century, owing to a combination of factors such as relatively cheaper air travel, the expansion of job opportunities, falling birth rates in some countries, and the availability of surplus populations in other countries, more and more people were

becoming increasingly mobile. There are international migrants and refugees as well as internally displaced persons. The latter group is often a product of civil war or social unrest.

MIGRANT LABOR

Political-economic globalization can be traced back to the slave trade in the sixteenth century with the forced movement of African slave labor to the Caribbean and North American plantations. Such forced and exploitative labor transfers are still practiced in various parts of the world. Colonialism and the European land grab marginalized the poor of many colonies who were eventually driven by the economic necessity to become indentured laborers. In the nineteenth century, the migration of Europeans to various parts of the world created white-settler societies such as Australia, New Zealand, and South Africa. Here, the migration issue was connected with racism and the marginalization of various Indigenous communities. Many of those problems remain, especially around the status of aboriginal people and their relationship to the land (Turner & Khondker, 2010: 107).

Mobile people are extremely heterogenous. They can be migrant workers, tourists, international students, or refugees. In addition to migrants and refugees, there were 48 million internally displaced persons in 2020 (UNHCR, 2021). One of the important trends in migration is an increase in South-South migration (Hujo & Piper, 2010; IOM, 2020). About 60 percent of all migrants are now found in the world's most prosperous countries and around 40 percent in the developing regions (GCIM, 2005) Migrants to industrially developed countries often seek permanent status and citizenship. Because of the high mobility of people across nations, many countries now accept dual citizenship. Professionals in certain specialized fields are very much in demand, and some countries offer incentives to attract these specialists. Indian software engineers can be seen in many different countries. Some countries, such as the Philippines, have taken a proactive attitude toward the export of labor or an out-migration strategy since the mid-1970s under President Ferdinand Marcos. In the first decade of the twenty-first century, Filipina women were employed as domestic workers in over 130 countries in the world (Parrenas, 2001: 1). It is estimated that there are eight million workers—both as domestic workers and in other trades—who are known as "overseas foreign workers" (OFW) from the Philippines who play a vital role in the economy of the country. The income they earn overseas helps sustain their families left behind in their homeland.

The World Bank estimates that worldwide remittances will reach $689 billion in 2021, with remittances to the developing world reaching $529 billion. India in 2021 again topped the list with the US$87 billion (World Bank, 2021). The idea that mobility begets possibility (Giaveanu, 2020) is often realized with migrants if this process is properly administered. However, often, poorly administered and

laissez-faire migration leads to a new category of vulnerable people known as "irregular" or "undocumented workers." Preying on their vulnerable existence and exploiting their ignorance, human traffickers lead people on uncertain journeys. According to the UN Refugee Agency, in 2021, 3,231 people died while trying to cross the Mediterranean Sea (UNHCR, 2022).

HUMAN TRAFFICKING AND SLAVERY

Some people choose to leave home in search of better jobs and security elsewhere, and such economic migration is often in response to the push and pull of the forces of globalization. They leave their home to avoid poverty and repression, while others are allured by the prospect of a better life in other places. Some people make choices on their own, but others are forced to migrate because of a host of factors ranging from economic deprivation to political repression to outright expulsions (or so-called compulsory repatriation). An extreme form of forced migration is human trafficking; children and women are often kidnapped, stolen, and sold into slavery.

Human trafficking has been identified as a new form of slavery in the present world, exposing some of the ill effects of uncontrolled globalization. The International Organization for Migration calls human trafficking the "most menacing form of irregular migration due to its ever-increasing scale and complexity, involving, as it does, arms, drugs, and prostitution." In this shady world, precise figures are difficult to come by. According to the International Labour Organization (ILO), there were 24.9 million victims of human trafficking around the world in 2016, of whom 10.9 million were women and 3.3 million were children. ILO also estimated there were 4.8 million sex-trafficking victims subjected to commercial sexual exploitation around the world in 2016. Ninety-nine percent of the victims were women, while 3.8 million were adults and 1 million were children (Ecker, 2022).

In the Trafficking in Persons Report published by the State Department of the U.S. government, "Trafficking in persons is a modern-day form of slavery, a new type of global slave trade." Perpetrators prey on the most vulnerable among us, primarily women and children, for profit and gain. Female victims continue to be overrepresented in trafficking in persons. "In 2018, for every 10 victims detected globally, about five were adult women and two were girls. About one-third of the overall detected victims were children, both girls, and boys, while 20 percent were adult men" (UNODC, 2021: 31).

Slavery was officially abolished in 1833 in the British Empire, in 1865 in the United States by the Thirteenth Amendment, and in 1886 in Cuba, but the practice goes on in our society under a different name. Human trafficking is the twenty-first-century version of slavery. The extent of slavery in the contemporary world is extensively documented, for example, in the works of Kevin Bales (1999, 2005).

According to Bales, since its general abolition in the late nineteenth century, slavery has slipped easily into the shadow economy. Slavery may be defined as the complete control of a person for economic exploitation by violence or the threat of violence (Bales, 2000: 461). With slavery, the person becomes a mere commodity or thing.

According to another authority, "Slavery exists today on an unprecedented scale." In Africa, tens of thousands are chattel slaves, seized in war or tucked away for generations. Across Europe, Asia, and the Americas, traffickers have forced as many as two million into prostitution or labor. In South Asia, which has the highest concentration of slaves on the planet, nearly ten million languish in bondage, unable to leave their captors until they pay off their "debts" (Skinner, 2008: 64). Bales estimates that there are twenty-seven million slaves in the world today, of whom fifteen to twenty million are in India, Pakistan, and Nepal (Bales, 2005). The positive view of the free movement of labor in a global economy will not want to deal with these issues and will instead attempt to focus on the material improvement of people in a deregulated global economy, where people have in principle the freedom to cross borders at ease in a borderless world. In general terms, the science of economics does not deal effectively with black markets and criminal activity in the marketplace, concentrating instead on the formal market in which goods and services are transacted according to formal, public rules. Consequently, academic economics dealing with formal and legal exchanges does not normally include criminal activity, which may keep a large section of the community in employment and the gross domestic product. Slavery, trafficking, and the informal, undocumented movement of people often remain unnoticed and unaccounted for. These people remain permanently marginalized.

BRAIN DRAIN TO THE BRAIN IN CIRCULATION

In the 1970s, "brain drain" was a popular slogan, and it was often regarded as one cause of the poor economic performance of those countries that were exporting their most talented doctors, engineers, and scientists to the rich, developed countries. Indeed, many talented young men and women migrated from the periphery to the core of the world economy for better educational and career opportunities. Universities in rich countries, such as the United States, were magnets for attracting foreign-born talent. This process was reversed in the 1990s and in the first decade of the twenty-first century. The notion of "brain drain" was supplemented by "brain gain," and Analee Saxsenian (2005) introduced the concept of "brain in circulation." Countries such as India produced many talented men and women in various scientific and engineering fields, only to be absorbed by the sluggish Indian economy of the 1960s, 1970s, and 1980s, which led to a serious outpouring of the Indian creative class to North America and elsewhere. In the 1990s and especially in the first decade of the twenty-first century, many such

talented Indians experienced in high-tech industries began to return to their own countries, which by then created conditions that would allow them to pursue their professional careers.

Brain drain remains a global problem from which the rich countries in the Global North benefit at the expense of the poor countries in the South. Reasons for brain drain are mostly economic: poor working conditions in the origin countries and the attraction of a better quality of personal and professional life in the destination countries. In the second decade of the twenty-first century, foreign-born people represented 10 percent of the workforce in OECD countries, a twofold increase since 1960 and a twofold increase since 1990. High-skill migration grew even faster, with a twofold increase during the 1990s alone (Alesina, Harnoss, & Rapoport, 2016: 102).

The idea that national borders have become more porous for the creative class was popularized by Richard Florida (2002). The footloose nature of the creative classes and the frequent movement of professionals have led some writers to develop the notion of "flexible citizenship" (Ong, 1999). Although Aihwa Ong developed the notion to describe the global flexibility of the Chinese business class, the phrase has become popular in the literature on global migration. While it may be the case for a small number of skilled professionals to move around at ease, often having more than one passport, for most working-class migrants, national boundaries remain a hard reality.

Some countries, such as Taiwan and Israel, have had effective incentive policies to reverse the outward trend of the migration of talented people. A reverse brain drain ensued. In the case of Taiwan, many Chinese from overseas—mainly from the United States—returned not only with swathes of cash, but many of them brought valuable scientific and technological knowledge with them, which assisted Taiwan's remarkable economic development. India has also been successful in capitalizing on these trends, and many Indians with years of overseas experience are now returning to India. Several Indian professionals in the information and technology industries have left Silicon Valley to return to Bangalore, the Indian information hub. Many Indian professionals are now returning to Bangalore and other economic hothouses in India with rich experience in technology, education, and finance. This rapid economic growth has also given India a prominent international status. Following trade liberalization and the opening of the economy to investments from outside, China has received huge funds and expertise from overseas Chinese communities. To attract people of Chinese origin, China maintained an ethnicity-based in-migration policy. In the rush to capitalist development, this economic stimulus was timely and important. In India too, NRIs, which meant "nonresident Indians," played an important role in India's high-tech development.

Diasporic communities rarely sever their links with the country of their origin, although, in many instances, these links may stretch over several generations. The

close community bonds of the diasporic groups sometimes have unfavorable consequences. The radicalization of young people often takes place in the diasporic environment of alienation and strangeness. Modern technology has played an important role in maintaining links between families and communities in the world of the diaspora. Unlike the diasporic situation of the past, migrants maintain a close link with their home countries, thus rendering the meaning of "home" tenuous. Diasporic Islamic groups often display a heightened sense of religiosity bordering on radicalism. Research has shown how some diasporic communities come under the influence of radicalized religion, thereby becoming the source of religious extremism in their countries of origin (Kibria, 2008).

MOBILITY OF IDEAS, IDEOLOGIES, AND KNOWLEDGE

Historically, transnational intellectuals have been purveyors of ideas, ideologies, and knowledge. Scientific knowledge in the present phase of globalization tends to travel from the Global North to the Global South, whereas in the last phase of the first millennium mathematical, philosophical, and physiological science knowledge traveled from China, India, and the Middle East to the West. Ideologies such as Marxism evolved in the West and became a dominant force in the so-called East as intellectuals-turned-leaders from Lenin and Trotsky in the former USSR to Chou En-Lai of China and others were schooled in Marxist ideology in the capital cities of the West. Later Asian nationalist leaders such as Mahatma Gandhi and Jawaharlal Nehru, their African counterparts such as Kwame Nkrumah and Jomo Kenyatta, and Ho Chi Minh of Vietnam were schooled in the ideas of nationalism, democracy, and socialism in the universities in Britain and France who, in turn, purveyed these ideas in their native countries. As the knowledge economy becomes the dominant mode of the global economy, globalization of knowledge becomes imperative. Universities have freely played a critical role in the dissemination of intellectual traditions, humanities, and social sciences. However, contradictions arise when it comes to sharing knowledge of sciences and technologies with immediate relevance to profit-making. Intellectual property laws have been designed to protect patent rights, but they can be an obstacle to knowledge sharing.

During the COVID-19 crisis of 2020–21, debates ensued when strong arguments were provided for and against relaxing intellectual property laws so that vaccines could become the global public good (Rake, 2021). The World Trade Organization on the one hand and South Africa and India on the other demanded relaxation of intellectual property laws for three years on humanitarian grounds so that vaccines could be produced during this time in multiple locations, especially in the vaccine-deficit part of the Global South, an effort that was opposed by the Big Pharma industries (Jecker & Aturie, 2021).

CONCLUSION

Globalization processes are intrinsically uneven in both their form and their effect. One of the challenges of the globalized world is that economy and politics are driven by divergent interests or logics. Modern economies require a flexible labor market in which workers can move rapidly and easily between different work sites depending on the local demand for labor inputs. Political imperatives and the state's need for sovereignty and security outweigh the economic needs for labor mobility. These controls inevitably involve greater negotiation and management of migration, and the result is the seesaw of labor mobility and immobility. Such contradictions are also present in the dilemma of free flow of scientific and technological knowledge dissemination and protection of information and copyrights via intellectual property laws. Setting aside such contradictions, mobility, as such—especially in knowledge, ideas, and technology—remains an intrinsic part and a defining feature of the global age, which is likely to be augmented by the AI and the new generative technology in years to come.

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5

The Myth of Deglobalization

Definitional and Methodological Issues

Didem Buhari

ABSTRACT

This chapter first discusses the lack of consensus on how to define *deglobalization*, a term that is likely to become the buzzword of the mid-twenty-first century. There are at least three different accounts of deglobalization. First, deglobalization is defined as a series of processes that serve to "reverse" globalization. Second, deglobalization is celebrated as an emancipatory project decentering the West and aiming at reglobalization. Third, from a historical perspective, deglobalization is understood as a temporary phase or "wave" that is constitutive of global polity. Then, the chapter focuses on the popular indices and measurements of globalization that are employed to better grasp the current state of globalization and predict whether it will be replaced by deglobalization. While quantitative measurement and indices serve to provide the "big picture" in terms of comparing hundreds of nation-states across certain (economic, political, social, and technological) dimensions of globalizations, they attract much criticism, not only for their methodological nationalism, but also for overlooking the complex, nonmeasurable aspects of globalization.

KEYWORDS

deglobalization, emancipatory project, globalization index, reglobalization

In the wake of the Global Financial Crisis of 2008, several nations sought to restrict trade and adopt stricter border controls against the global flow of people, services, and capital. Regional developments such as the Arab uprisings and the ongoing Syrian conflict since 2011 had global effects in terms of both reinforcing radical Islamist terrorism and causing a refugee crisis, which added fuel to the

rising xenophobia and far-right populist politics in Europe and elsewhere. Add to this the detrimental effects of the COVID-19 pandemic on economy, society, politics, and culture. Unable to easily reach the necessary quantity of masks and vaccines, many states chose to ban travel and reduce international cooperation and aid. Trust in international cooperation mechanisms declined. Accordingly, Brexit (the United Kingdom's withdrawal from the European Union) was interpreted as an important symptom of deglobalization. States also fear the rise of criminal networks, nonstate armed groups and terrorist organizations that smoothly operate across borders without being easily tracked down and punished. The rising uncertainty around the liberal world order led to the revival of "strongman politics" in the form of new authoritarian leaders who override democratic constraints by emphasizing "Nation First!" From Russia's Vladimir Putin to America's Donald Trump, from Hungary's Viktor Orbán to India's Narendra Modi, strongman leaders in both Western and non-Western parts of the world oppose cosmopolitan ideals and undermine the global governance mechanisms of the post–World War II liberal world order. They tend to see domestic restrictions on the flow of people, goods, labor, and liberal ideas as justified. They openly blame globalization for domestic problems such as rising youth unemployment, socioeconomic malaise, health issues, and persevering wars and conflicts.

Even the United States—the main provider of security guarantees and economic incentives for the maintenance of the post–Cold War world order—fell prey to strongman politics under the Trump administration (2017–21). It was reluctant to endorse novel multilateral efforts for the consolidation of global regimes on environment, justice, and diplomacy (such as the International Criminal Court, and the Iran nuclear deal, among many others) and withdrew from the established ones such as the INF Treaty (US-Soviet arms control agreement of 1987). The U.S. retrenchment or abdication from world affairs due to both intervention fatigue associated with the post-2001 war on terror and the rise of challengers such as Russia and China as economic and political forces in the global system has led many to publicly claim that "globalization as we know it is over" (Sharma, 2016). In academic and policy circles, the concept of "deglobalization" is increasingly used to warn policy makers that there is a need for better grasping the emerging world order and the new threats and opportunities associated with it. However, there is a lack of consensus on how to define deglobalization. While the prefix *de-* hints at the "reversal" of globalization, several analyses refer to deglobalization to mean different things from diverse perspectives. They also provide different types of evidence for deglobalization. This chapter dwells on the definitional and methodological issues arising from the recently (re)popularized concept of deglobalization. The chapter's main argument is that defining deglobalization as the end of globalization is oversimplistic and reductionist. Deglobalization as "the end of the world as we know it" is a myth.

The chapter is organized as follows. First, it summarizes the three different accounts of deglobalization that can be frequently found in the academic literature, in the media, and in policy documents: deglobalization as the reversal of globalization, deglobalization as an emancipatory project, and deglobalization as a phase (or wave) that is constitutive of global polity. Second, it focuses on the main indices and measurements of globalization that are employed to better grasp the current state and future trajectories of globalization processes. Finally, it provides a summary of the sociologically informed criticisms against the way of understanding and explaining deglobalization.

MULTIPLE MEANINGS OF DEGLOBALIZATION

Barrie Axford (2013) explains that globalization is used to refer to three different phenomena: a process, a project, or a polity. Similarly, the concept of deglobalization implies various phenomena related to processes that seek to reverse global flows of people, goods, services, and ideas; to projects of emancipation from a Western-centric and capitalistic global order; and to cyclical phases of the global polity that inherently involves globalization and deglobalization "waves" from a historical perspective. While Walden F. Bello (2002) popularized deglobalization as an emancipatory project, the recent tendency is to understand deglobalization as "the curtailing of globalization *tout court*" (Steger & James, 2020: 190). Hence, the following part starts with the definition of deglobalization as "reversing globalization by returning to just doing things in unconnected places" (Lechner, 2009: 52). It will then discuss the account of deglobalization as a project and, finally, as a constitutive phase of global polity.

Deglobalization as Reversing Globalization

This radical and pessimistic account of deglobalization predicts the end of globalization. In academic and policy circles, it is increasingly used to argue that globalization is eventually coming to an end due to various social, economic, and political crises that force nation-states to close their borders. The argument is that the reactionary backlash reinforces the global resurgence of parochialist worldviews that seek to end globalization once and for all. Deglobalization is roughly defined as the "opposite" of globalization or "globalization going in reverse" (Pieterse, 2020: 235). If globalization is "the process of increasing interdependence and integration toward a world society," deglobalization signifies "the process of diminishing interdependence and integration between certain units around the world, typically nation states" (Kim, Li, & Lee, 2020: 83–84).

Deglobalization requires active efforts by national governments to reverse the already existing global networks and institutions through "the reconstruction of national barriers to trade, investment and migration; the reshoring and shortening of supply chains; and movement toward exclusive regional trade blocs and

great-power spheres of influence" (Arase, 2020: 4). It entails "a reduction of global exchange and a reassertion of national control over commerce, politics and social affairs" at the expense of global governance mechanisms such as the International Monetary Fund, the World Trade Organization, and the World Bank (Ripsman, 2021: 1328). Accordingly, "Deglobalization is a movement towards a less connected world, characterized by powerful nation states, local solutions, and border controls rather than global institutions, treaties, and free movement" (Kornprobst & Wallace, 2021).

Accordingly, deglobalization involves a series of processes that reverse deterritorialization by reinforcing territorial segmentation in the global polity and helping states regain their sovereignty over national territories. Moreover, it entails the reversal of the cross-national functional integration in certain sectors where the flows of capital and services had already reached a significant level since the end of the Cold War. This does not only mean the reduction in the level of international trade and foreign investments globally. It also means the rise of "parallel orders" (Benedikter, 2022: 8) led by rising power China, which for instance aims to replace the U.S. dollar with Chinese yen as the global currency in trade.

Furthermore, deglobalization reverses the social and political stratification in the current global polity. Many rising powers in the non-Western world contest the legitimacy of the liberal world order and its global governance mechanisms such as the United Nations, among others. They suggest that the world order and its institutions tend to reflect Western interests and norms, which also makes it easy for Western states to enjoy certain privileges and impose "double standards" on other nations. For instance, during the George W. Bush administration, the United States bypassed the UN and formed its "coalition of the willing" in order to attack Saddam's Iraq. Yet, it condemns Russian and other states' international interventions for violating the multilateral order led by the UN. For their part, many African states protested the International Criminal Court due to its inability to penalize big Western states.

Besides, during the Trump administration, the United States also challenged several security and economic arrangements of the liberal world order. It signaled its interest in abdication from world affairs to both its allies and adversaries. The United States' military withdrawal from Afghanistan, its failure to effectively respond to the terrorist attacks against the Saudi oil storage facility (Aramco) and the Russian aggression against Ukraine, and its criticisms of NATO led many of its allies and foes to think that U.S. hegemony was in decline. French president Emmanuel Macron commented to the international media that the United States was as threatening for European and world security as Russia and China and had rendered NATO "brain-dead" by preferring pragmatic, transactional, and bilateral dialogue over Syria and many other crises, undermining NATO's strategic decision-making mechanisms (*The Economist*, 2019). The deepening transatlantic rift between Europe and the United States over many foreign and security issues such

as the relationship with Russia, China, Iran, and Israel provokes debates in Europe about the emerging need for an autonomous European army and defense industry. Overall, deglobalization refers to the dissolution of the global and Western-led governance mechanisms and institutions that sought to maintain stability and order in the post–Cold War era.

While some believe that deglobalization is a structural phenomenon that is "here to stay" (Novy, 2022: 76; Hammes, 2019), others find it a temporary phase. Many analysts emphasize that globalization has visibly "slowed down" in the last decade but this does not mean the end of globalization (Olivié & Gracia, 2020). Sociopolitical, economic, and cultural processes of globalization are not likely to be easily reversed (Steger & James, 2019). Frank J. Lechner (2009: 52) finds "reversing globalization by returning to just doing things in unconnected places—'deglobalization'—hard to imagine." Hence, deglobalization seems to be a limited and temporary phenomenon in the twenty-first century (Karunaratne, 2012). An alternative definition of deglobalization considers the latter as a project of emancipation decentering the West in the global polity.

Deglobalization as Decentering Globalization

A Filipino sociologist, Walden Bello (2002), popularized the term *deglobalization* as a political project of emancipation against Western neoliberalism underlying the current trajectory of globalization. This radical and optimistic account criticizes the imposition of Western norms, actors, and institutions as universal standards and sees deglobalization as a panacea. Here, deglobalization is presented as an emancipatory project to save the nation, the state, and the individual from the pernicious effects of globalization that reinforce inequalities, deprivation, and violence across nations, regions, classes, and people.

For Bello, deglobalization means "the re-empowerment of the local and the national" (2002: 114). Criticizing the current form of globalization as reinforcing poverty, discrimination, inequalities, and environmental problems, Bello suggests that deglobalization can bring an alternative system where elite-driven and transnational companies–led global projects can be replaced by people-oriented democratic policies that enhance social solidarity, equity, and security (Bello, 2002: 114). Similarly, Neo-Marxist accounts of globalization criticize the "Davos spirit" that implies the predominance of top-down elite projects led by the Western capitalist classes in determining the global rules of economic, political, and social interactions (Curty, 2017).

From a non-Western and postcolonialist perspective, deglobalization as a project would bring the decline of the Western norms and power that not only shaped the globalization processes in the post–Cold War era but also hijacked the dominant social and political imaginaries (see, for instance, Elmandjra, 2000). Writing for the 2021 special issue of *International Affairs* on deglobalization, Navnita Chadha Behera suggests that deglobalization "opens up a realm of new possibilities

to challenge the western hegemony in knowledge production" by giving voice to those whose past and "ways of knowing" had been "buried" by Western-centric ontologies that shaped globalization (2021: 1580). Similarly, from a feminist perspective, globalization is denounced for reinforcing gender injustices. Hence, deglobalization is seen as an attempt to "give voice" to the underrepresented and disadvantaged actors, if not the "subaltern."

Yet, Bello and other followers of the deglobalization project do not necessarily foresee or advocate the end of globalization. Rather than disentangling from the international economy, deglobalization is about diminishing dependence on foreign investment and production for export and producing for the local market with domestic resources (Bello, 2002: 113). In fact, the movement of "deglobalization" observed in the national economy is likely to coexist with a movement towards constructing a "pluralist system of global economic governance" (Bello, 2002: 112). Therefore, deglobalization involves both a deconstruction of the post-1945 global governance mechanisms and the reconstruction of a more inclusive and legitimate governance through "globalization from below." Deglobalization cannot restore the status quo ante in the sense that it is not possible to return to a spatiotemporal context where and when globalization did not exist. It is not possible to unthink or unlearn global social imaginaries.

Hence, deglobalization as a project aims for a reformed globalization or "re-globalization" (Paul, 2021). "As a program, re-globalization denotes attempts at reform, revision, or renewal of 'classical' globalization since the 1990s" (Benedikter, 2022: 17). Reglobalization is the (1) refining, (2) recontextualizing and reframing, (3) reforming, (4) redefining, and (5) revisioning of globalization (Benedikter & Kofler, 2019). Accordingly, reglobalization involves a double-movement: the rethinking of the Western-centric world order due to rising multipolarity and the "redefinition of the West" in both economic, political, and cultural terms (Benedikter, 2021: 78). An advocacy of deglobalization without reglobalization would raise questions about how "poor countries would benefit from focusing on the local market and de-emphasizing growth" (Lechner, 2009: 278). Many scholars who criticize the current state of globalization for creating global injustices are not merely deglobalizers, but they seek "reglobalization" in a more humane, just, and fair way (Lechner, 2009: 279).

Finally, there are at least two different types of deglobalization projects: "deglobalization from the right" and "from the left" (Bishop & Payne, 2021). Both of them seek a halt to the "'unholy' alliance between neoliberal realism and left-liberal cosmopolitan idealism that shaped the self-understanding of Western-led globalization over the three decades 1990–2020" (Benedikter, 2022: 11–12)—albeit with different motivations. While rightist deglobalization entails a regressive neonationalist trend of deinternationalization and renationalization, leftist deglobalization is progressive in terms of building, for instance, a "green state" (Bishop & Payne, 2021: 8). Accordingly, while some deglobalizers call for the

return of the local and economic nationalism, others suggest regionalism. In this sense, deglobalization as a project covers various anti- and alter-globalist visions that aim to decenter the West in the global polity. The following part explores the accounts of deglobalization as a temporary phase or "wave" that is constitutive of the global polity.

Waves of Deglobalization

It is often thought that deglobalization is a reactionary and corrective movement against the pernicious effects of globalization. It is therefore an antiglobalization backlash. Its origins date back to the 1999 Seattle protests of the World Trade Organization (Ripsman, 2021). The main argument is that throughout history, hyperglobalization has brought about counterphases of deglobalization where states began to look inward and restrict cross-national flows (Karunaratne, 2012; Holton, 2011: 228). Strong globalization "carries the seeds of its destruction" as it leads national governments to limit their internationalization (van Bergeijk, 2019). For Geoffrey Jones (2005), the globalization wave of the 1840s was followed by deglobalization waves in the wake of the 1929 Great Depression, and then the Second World War and the Cold War. In particular, in the 1930s nation-states attempted to limit imports in order to increase domestic production, which was considered an important symptom of deglobalization (Hillebrand, 2010). Jonathan Friedman (2014: 518) concurs that the world witnessed economic and cultural deglobalization from 1920 to 1945.

Economic historians tend to divide the history of globalization into various "waves." For instance, Neil Dias Karunaratne (2012: 374) provides a list of waves of globalization (1870–1914, colonization-led; 1946–73, free trade–led; and 1980–2009, capital mobility–driven) and deglobalization (1914–30, protectionism; 1939–46, interwar) since the nineteenth century. According to Hermann Schwengel (2006), an economic recovery after "the deglobalization of the world wars" began in 1973 and it was followed by a political globalization phase after the collapse of the Berlin Wall in 1989. This contributed to the consolidation of globalization as a "core concept" in the late-twentieth-century social imaginary (James & Steger, 2014: 423).

> The world-system has certainly become more integrated in the latest wave of globalisation. The current high degree of economic integration is already higher than the peak in the 19th century, but we should also remember that waves of globalisation have always been followed by periods of deglobalisation in which long-distance interaction decreases, and this is likely to also be true of the future even though most analysts find this difficult to imagine. (Chase-Dunn & Lawrence, 2011: 144)

In a 2014 interview given to a special issue of *Globalizations* edited by Manfred B. Steger and Paul James, Jonathan Friedman argued that the world was heading towards another deglobalization phase in terms of a "decline in connectivity." For Friedman, such periods of deglobalization are produced by the changes in

the global system "due to hegemonic decline and the fragmentation that it generates" (Friedman, 2014). A recent wave of deglobalization in the post–Cold War era has been triggered by the United States' retrenchment and its geostrategic and geo-economic competition with the rising powers in Asia as well as the legitimacy crisis of the post-1945 liberal world order. In addition, the 2008 World Economic Crisis, the rise of populism, the U.S. retrenchment, Brexit, the deepening of the transatlantic rift, trade wars, and the COVID-19 pandemic can be seen as accelerators of the current wave of deglobalization (van Bergeijk, 2019).

Attempts at historical periodization of deglobalization remain flawed due to the multifaceted and complex nature of globalization. For instance, Joseph S. Nye Jr. (2009) reminds readers that while the post–Cold War era saw the rise of economic globalization, there was simultaneously deglobalization in the military sector due to the reduction of troop deployments abroad. Similarly, Florian Haelg (2020) notes that after the 2008 financial crisis, trade integration declined and economic globalization stagnated whereas social, political, and financial globalization progressed. It is therefore necessary to take more seriously the multidimensional and complex nature of globalization while attempting to measure the level of deglobalization today.

METHODOLOGICAL APPROACHES TO DEGLOBALIZATION

The current discourses on deglobalization are endorsed by positivist approaches that tend to reduce globalization to its economic dimension (Holton, 2011: 229). Measuring the decline in the world trade and capital flows and stressing the rise of protectionism, currency wars, and sanctions, many claim that deglobalization is looming on the horizon. For instance, Hag-Min Kim et al. (2020) claim that deglobalization can be estimated by the decline in the share of import in a country's gross domestic product (GDP). They particularly focus on the increase in the import tariff and nontariff barriers imposed by the developed countries (Kim et al., 2020: 85).

In order to measure deglobalization, many scholars focus on the decline in the levels of trade interdependence, capital flows, and migration (Hillebrand, 2010: 14). World exports of goods as share of world GDP and foreign direct investment as share of world GDP are therefore important empirical indicators of deglobalization (Karunaratne, 2012). The withdrawal of multinational companies from the global market can also be counted as reflecting deglobalization (Hammes, 2019: 13). An increase in the regulatory restrictions reported by the OECD Services Trade Restrictiveness Index—such as limits on foreign equity, nationality of board of directors, licensing requirements, cross-border mergers and acquisitions, capital controls, work permit requirements, entry visa quotas, duration of stay for foreign persons providing services—is used as an indicator of deglobalization in the trade sector (BIS Papers, 2018). However, economic data give mixed

results about deglobalization (James, 2017). Furthermore, economistic accounts of deglobalization "are too narrow from a sociological point of view" as they overlook "complex cultural, political and social exchanges" (Raab et al., 2008: 597).

The literature on deglobalization points to trade imbalances, unemployment rate, trade conflicts, and rising populism as the main drivers of deglobalization (Kim et al., 2020: 83–84). In addition, the COVID-19 pandemic has accelerated the limitations of movements of people, goods, and services, which led to the further shrinking of the global economy (Kim et al., 2020: 84). Investigating 169 countries, the DHL Global Connectedness Index (2018) emphasizes that even though there is a certain increase in the international flows after the 2008 World Economic Crisis, national barriers to trade, crackdowns on foreign investments, and resistance against immigration remain alarming (Altman, Ghemawat, & Bastian, 2019).

While the DHL Global Connectedness Index focuses on connectivity rather than globalization as a whole, there are several indices and measurements of globalization used in the literature: the KOF Index of Globalization (Gygli et al., 2018), the A.T. Kearney / Foreign Policy Globalization Index (Kearny / Foreign Policy, 2003), the Centre for the Study of Globalization and Regionalization Index (Lockwood & Redoano, 2005), the Maastricht Globalization Index (MGI) (Figge & Martens, 2014), and the New Globalization Index (NGI) (Vujakovic, 2010). Economic indicators that are frequently used in various indices on globalization include: exports or trade, Income payments and receipts, capital and portfolio flows, foreign direct investment, and other financial flows and reserves. As regards the flow of people, a decline in international migrants, students, remittances, travel, and tourism can be considered as a slowing-down of globalization. Flow of information through communication technologies is another aspect of globalization that is covered by many indices. Hence, the changes in international telephone traffic, Internet users and hosts, Internet bandwidth, and digital flows (social media and cross-border e-commerce) are studied in order to better grasp the current phase of deglobalization. In addition, technological innovations and trade in cultural goods and personal services (based on, for instance, international trademarks) are covered by several indices on (de)globalization.

Since 2002, the KOF Globalization Index provides data on globalization that covers almost every country in the world from 1970 to 2016.[1] Introduced by Dreher (2006), the index was updated (Dreher, Gaston, & Martens, 2008) and then revised (Gygli et al., 2018). Its revised version measures de facto and de jure globalization with a focus on the economic, sociocultural, and political dimensions of globalization. It criticizes the measurements of globalization that reduce the complex process into its economic dimension.

> Single indicators, often reflecting openness, such as trade as a percentage of GDP, are frequently used as a proxy for globalization. Globalization is, however, a multifaceted concept that encompasses much more than openness to trade and capital flows. It also includes citizens of different countries communicating with each other and

> exchanging ideas and information, or governments working together to tackle political problems of global reach. Consequently, scholars need to account for manifold facets of globalization. (Gygli et al., 2018: 2)

Political and military dimensions of globalization are also taken into consideration by certain indices. For instance, the A.T. Kearney / Foreign Policy Globalization Index assesses changes in nation-states' political engagement by looking, for example, at their membership in international organizations, their ratification of multilateral treaties, and their contribution to the budget and the missions of the United Nations. Moreover, the numbers of foreign embassies and of international nongovernmental organizations are taken as empirical indicators of political globalization. Finally, military globalization is often measured by the changes in the deployment of military force and contribution to the UN peacekeeping operations.

In addition, Iliana Olivié and Ignacio Molina (2011) introduced the Elcano Global Presence Index, which measures 120 countries' international projection in terms of economic, military, and soft (migration, tourism, culture, sports, information, education, science, technology, development cooperation) presence. They conclude that "the world is not experiencing a process of de-globalization. Globalization has slowed down since the beginning of the decade but has retrenched in only two years (−0.7% in 2014 and −1.4% in 2015) and is now recovering" (Olivié & Gracia, 2020: 996). They suggest that economic globalization has slowed down in the last decade but what is striking is the change in the nature of globalization: the soft dimension of globalization has become the main driver of the current phase of globalization (Olivié & Gracia, 2020: 997).

An alternative index is Marcel Raab et al.'s (2008) GlobalIndex, which seeks to add sociological factors about the cross-national convergence of norms and values such as human rights. It aims to cover economic, sociotechnological, political, and cultural dimensions of globalization at the same time. GlobalIndex criticizes the KOF Globalization Index for neglecting the proxy indicators of sociotechnological globalization such as the international spread of landlines and cell phones and of the English language as the lingua franca, as well as the import and export of books or periodicals (Raab et al., 2008: 606). The revised version of the KOF Globalization Index is better in this regard. Yet, it is still found deficient in measuring cultural globalization. While it includes McDonald's and IKEA franchises as proxy indicators of cultural globalization, it fails to include other indicators related to cross-national convergence of norms and values, including "the right to education, its importance as a factor of production, the spread of human rights, gender equality, the increase in urbanization and the increasing tertiarization as globally shared values and standards" (Raab et al., 2008: 606).

Moreover, Randolph Kluver and Wayne Fu's (2004) Cultural Globalization Index aims to measure the spread of cultural values and ideas. Yet, they resort to the imports and exports of books, brochures, newspapers, and periodicals as proxy indicators of cultural globalization because other possible indicators lack

systematic data sources (Martens et al., 2015: 222). Consequently, their analysis emphasizes the centrality of English-speaking advanced countries in cultural globalization, at the expense of the non-Western dimension of cultural globalization (Martens et al., 2015: 222).

In addition to a Western-centric bias, the arbitrary and subjective choices underlying the construction of such indices have already been denounced by several scholars:

> First, a judgement is made about the 'relevant variables' that should enter the index. Second, quantitative measures of these variables are made—here, data constraints are important. Third, these quantitative measures are normalised, to deal with the problem that different variables are typically measured in different units and therefore may yield wildly different numerical values . . . Fourth, a weighted sum of the normalised variables is calculated, which gives a numerical score for each country. (Lockwood, 2004: 507)

It is difficult to leave aside one's personal, cultural, and other values, which may insert bias in the construction of a globalization index (Figge & Martens, 2014). Moreover, composite indicators used by these indices are only estimates of complex phenomena related to globalization (Martens et al., 2015: 219). A priori decisions of the researcher about what dimensions of globalization will be studied and prioritized directly affect the analysis. In particular, the tendency to measure the changes in the level of global connectivity should be complemented with an in-depth analysis of global consciousness (Caselli, 2008; Martens et al., 2015; Robertson & Buhari-Gulmez, 2016). Yet, how to measure one's consciousness of one's global existence remains a challenge (Martens et al., 2015: 223).

The Kearney / Foreign Policy Globalization index measures outcomes of globalization rather than the main policy towards global interactions (Lockwood, 2004). For instance, rather than using the value of total trade as a percentage of GDP to measure trade openness, focusing on trade policy such as tariff and nontariff barriers to trade imposed by national governments makes more sense because outcomes are determined by a nation's specific economic, demographic, and geographical characteristics (Lockwood, 2004: 510). Yet, national policies on noneconomic aspects of globalization cannot be quantitatively measured (Lockwood, 2004: 511). It is therefore necessary to develop interdisciplinary studies that adopt mixed methodology reconciling quantitative and qualitative research on globalization (Martens et al., 2015).

There is also a need to go beyond methodological nationalism, which limits a better understanding of globalization as a multiscalar process that takes place not only at nation-state level but also in various territorial (e.g., city), supraterritorial (e.g., planet), and nonspatial (e.g., class and gender) realms (Martens et al., 2015: 225). There have been certain attempts to go beyond methodological nationalism in globalization indices by introducing the Person-Based Globalisation Index

(Caselli, 2013) and the Global Cities Index by A.T. Kearney (2018). Marco Caselli admits that it is difficult to operationalize several of the themes that his proposed Person-Based Globalization Index seeks to cover—individual resources and ability to operate in the global scenario; mobility in global domains; sense of belonging to global community; exposure to and participation in global flows of mass communication; and degree of global consciousness (Caselli, 2013).

For its part, Kearney's Global Cities Index seeks to measure the degree of global engagement of 156 cities across five dimensions: business activity, human capital, information exchange, cultural experience, and political engagement. The Index focuses on factors such as the city's market dynamics, education levels, information access, culture and entertainment options, and presence of international civic organizations. Last but not least, many of the capital, trade, and people flows today take place within regions rather than between regions (Hammes, 2019: 19). Hence, deglobalization means fewer interregional but more regional interactions. Based on diverse historical backgrounds, socioeconomic status, and institutional settings, regions are differently and unevenly affected by globalization. The measurements of deglobalization need to take into account the analytical distinction between regionalism (or internationalization) and globalization (Martens et al., 2015: 219). However, data on alternative territorial units such as persons, cities, and regions remain scarce due to the prevailing state-centrism in determining the main unit of analysis (Martens et al., 2015: 221). Therefore, the question of deglobalization remains a serious methodological challenge for those who want to capture the complex and multidimensional character of globalization.

IN LIEU OF CONCLUSION

This chapter has summarized the main tendencies in defining and measuring deglobalization today. As a project, deglobalization is far from bringing equality and prosperity to the disadvantaged communities. Given the uncertainty around the effects of deglobalization in economic, social, and political terms, it is not easy to consider deglobalization as a savior of the nation-state. Several scholars contest the optimism about deglobalization:

> We do not believe that deglobalization will necessarily bring about a more equitable global order, irrespective of whether this notion refers to the undoing of all or most forms of international cooperation, or to the abandonment of the multilateral trading system in favour of bilateral trade relations whereby the most powerful states are best able to secure their interests. (Hannah, Roberts, & Trommer, 2021: 71)

Besides, deglobalization does not necessarily mean localization or local self-sufficiency. It accelerates the emergence and consolidation of regional blocs at the expense of national sovereignty and local authorities. It is also misleading to use deglobalization interchangeably with decolonization or the "decentering" of

the West. Deglobalization cannot be relegated to anti-Western or antiglobalist phenomena. Jarrod Hayes and Katja Weber (2021) suggest that deglobalization is more about changing the operational environment for international actors than reversing globalization. Deglobalization is often thought of together with reglobalization.

The present degree of interdependence of world technology and production precludes deglobalization or complete local self-sufficiency. The system is fragile and could collapse at any time. A collapse would bring misery even deeper and more widespread than is now experienced by the most poverty-stricken. Reglobalization, not deglobalization, is required, and it can be accomplished in a way that will provide for considerable local control, including autonomy for Indigenous peoples (Bray & Bray, 2002: 118).

Sociologically informed critiques of the prevailing accounts of deglobalization emphasize the inherently complex and uneven character of the globalization processes. In this context, while globalization has slowed down in some sectors, it has accelerated in other realms. "Deglobalization could well be occurring on some levels, while re-globalization intensifies on others" (Featherstone, 2020: 160). For instance, Steger and James (2019) emphasize that "disembodied globalization"—in terms of a flow of ideas, electronic texts, audiovisual materials, and digital currencies across national borders—is accelerating, whereas both "embodied globalization"—the flow of peoples, including workers, migrants, and refugees—and "object-extended globalization" (circulation of goods) are increasingly facing national restrictions. Hayes and Weber (2021: 1472) report that:

> With respect to the physical technological component of globalization, deglobalization is largely not occurring. The physical technological underpinnings of globalization—mass air travel, containerized shipping, large-scale infrastructure projects (dams, railroads, ports, palm oil plantations) enabled by digitized and globalized financial flows, the ICT revolution—are not diminishing. Indeed, the growth in internet connectivity continues, increasing the potential for further expansion of the intensity and scope of globalized processes.

Referring to the concept of "physical deglobalization" (Livesey, 2017: 171), Steger and James (2020: 196) remind us that "the flipside of 'deglobalization' is 'reglobalization,' that is, a profound rearrangement of its constituent formations that move at different speeds and at different levels of intensity." It is therefore crucial to remember that globalization is a "self-limiting" process in the sense that it involves both integration and fragmentation or the "universalization of the particular" and the "particularization of the universal" at the same time (Robertson, 1995, 2018). In this regard, it is plausible to argue that globalization inherently involves deglobalizing dynamics, if not "waves" that constitute the global polity. Hence, "deglobalization and globalization are both global systemic phenomena" (Friedman, 2014: 524). Accordingly, from a critical perspective, defining deglobalization as the end or reversal of globalization is an exaggeration, if not a myth.

NOTE

1. www.kof.ethz.ch/globalisation.

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6

The Coloniality of Globality and Media

The Latest Structural Transformations of the Global Public Spheres

Eduardo Mendieta

ABSTRACT

This chapter offers a sketch of what the author calls the "mestizo/decolonial" version of theorizing globalization. The argument is that if we live in a globalized world, it is because it was also colonized, that is, colonization is one of the strongest and oldest forces of globalization. Then, the chapter considers the role of what Jürgen Habermas called the bourgeois category of the "public sphere" in the age of globalization(s). Two questions are key: How does the concept of the "public sphere" relate to globalization? If we can talk about a world society that has been partly created by processes of globalization, can we also talk about the rise of global public spheres? In this context, a second question is raised: in the putative age of world public spheres, can we also continue to talk about the rational and rationalizing dimension of the public sphere as the social/political/cultural/economic sphere in which something like "public opinion" can, could, should be wanted or had? The final section offers an analysis of the "newer or latest structural transformations" of the public sphere by focusing on the effects of the rise of "social media" and new "communication technologies" and their effects on the political.

KEYWORDS

cell phone, coloniality, global public spheres, mestizo/decolonial, public opinion, social media

HOW WE ARE EITHER TOO GLOBALIZED OR NOT ENOUGH

It would be irresponsible and misanthropic not to mention what has been going on during the writing of this chapter. There is much to be foregrounded. First, there is the COVID-19 pandemic, which has claimed the lives of more than six million people, more than a million in the United States alone, as of this writing. This pandemic started out as a global health crisis that then snowballed into a global systemic crisis, impacting economies, politics, food production, and transportation. Second, there is the relentless background crisis of global climate change, which continues to manifest itself with ever more turbulent and destructive weather. Two major consequences of this severe weather have been food crises and the rise of climate refugees, both across nations and within nations. Third, in 2021 as we finally saw the withdrawal of U.S. troops from Afghanistan, after a twenty-year war that apparently led nowhere (since the gains made there have been revoked and dismantled by the new regime), Russia launched its invasion of Ukraine. In both cases, new humanitarian crises have been unleashed. In Afghanistan, the country has retreated to its barbaric past, in particular unleashing new waves of violence against women. The Russian invasion of Ukraine has meant an unaccounted number of civilian deaths, and it has also unleashed a wave of shocks to the global economy, above all to the food supply chain, which is projected to have dire consequences for those countries that rely on Ukrainian fertilizers, grain, and oil. Fourth, as our world has become more globally integrated, interdependent, and vulnerable, we have the rise of the new, or not so new, right-wing, nativist, and xenophobic populisms in both the so-called developed and developing worlds.

The last decade, and in particular the last half a decade, has been the stage for a perfect global storm: a global pandemic, major shocks to the national and global economies, new humanitarian crises with the end of hostilities in one place and the beginning of severe ones in another. And as the medicine that is worse than the disease, we have the rise of antiglobalist nationalism. One could say that these crises all reveal how globalization is a decisive fact of our modern world. The COVID-19 pandemic is a by-product of our globalized work and commodity markets. The ways we either address it or fail to are indicators of global networks. Yet, we should also highlight that the global health crisis was managed at national levels. Even the European Union did not have consistent or generalized health measures. In the United States the situation was even worse, for every health measure was politicized to further heat up an already boiling political polarization. The fact that we have yet to meet the goal of vaccinating 70 percent of the global population against the coronavirus is an indication of both successful and failed globalization., while the spread of the virus across the globe partially shows how much we have been globalized. Developing nations in particular have been hard hit by the pandemic (India is a case in point) because of the lack of access to (reliable) vaccines. So, one could say that this shows how poorly globalized we remain. And just as the

global economy was beginning to rebound from the shocks of the COVID-19 pandemic, after the global economic crisis of 2008–9, the Russian invasion of Ukraine has unleashed another global economic crisis, partly fueled by the uncertainty in the fuel supply—whether it be gas, oil, or electricity. Again, we are either too globalized, or not enough, that such crises continue to recur. The return, revival, and metastization of populism into rabid xenophobic and racist politics is a global phenomenon that must be seen as a response to globalization. It is for this reason that many of these populist leaders see themselves as antiglobalists.

In what follows and against the background of this bleak global outlook, which has resulted from both globalizing and antiglobalizing forces, I want to consider how we must rethink "globalization," both as a form of theorizing and as a fact of our modern world system. In the following section, I will offer a sketch of what I will call the "mestizo/decolonial" version of theorizing globalization. The argument there is that if we live in a globalized world, it is because it was also colonized, that is, colonization is one of the strongest and oldest forces of globalization. Then, I will turn to consider the role of what Jürgen Habermas called the bourgeois category of the "public sphere" in the age of globalization(s). There are two major questions motivating this section. One asks: how does the concept of the "public sphere" either square or not with globalization? If we can talk about a world society that has been partly created by processes of globalization, can we also talk about the rise of a global public sphere? In this context, partly staged through a confrontation between two thinkers of the public sphere, namely Habermas and Niklas Luhmann, the second question is raised: in the putative age of a world public sphere, can we also continue to talk about the rational and rationalizing dimension of the public sphere as the social/political/cultural/economic sphere in which something like "public opinion" can, could, should be wanted or had? In a final section, I turn towards what Habermas has most recently called a "newer structural transformation" of the public sphere by focusing on the effects of the rise of "social media" and new "communication technologies" and their effects on the political (Habermas, 2021). I will argue that the newer "social media" has had both beneficial effects and corrosive consequences, in particular for public deliberation, democratic self-determination, and nondomination. Their effects are consequences of globalization and antiglobalization forces.

GLOBALIZATIONS FROM ABOVE AND BELOW, VERTICAL AND HORIZONTAL: MESTIZO/DECOLONIAL GLOBALIZATION

The literature on globalization, or rather, to speak along with Manfred B. Steger (2008), globalisms, is too vast and rich to attempt to say anything meaningful in the space of a chapter. At the most, one can attempt a typology of theories of globalization, which may allow us to begin to get a handle on the concept and assumptions that inform some of its theorization. In their important and still indispensable

TABLE 6.1 Conceptualizing Globalization: Three Tendencies

	Hyperglobalists	Skeptics	Transformationalists
What's new?	A global age	Trading blocs, weaker geogovernance than in earlier periods	Historically unprecedented levels of global interconnectedness
Dominant features	Global capitalism, global governance, global civil society	World less interdependent than in 1890s	"Thick" (intensive and extensive) globalization
Power of national governments	Declining or eroding	Reinforced or enhanced	Reconstituted, restructured
Driving forces of globalization	Capitalism and technology	States and markets	Combined forces of modernity
Patterns of stratification	Erosion of old hierarchies	Increased marginalization of South	New architecture of world order
Dominant motif	McDonalds, Madonna, etc.	National interest	Transformation of political community
Conceptualization of globalization	As a reordering of the framework of human action	As internation-alization and regionalization	As the reordering of interregional relations and action at a distance
Historical trajectory	Global civilization	Regional blocs/ clash of civilizations	Indeterminate: global integration and fragmentation
Summary argument	The end of the nation-state	Internationalization depends on state acquiescence and support	Globalization transforming state power and world politics

Global Transformations: Politics, Economics and Culture, from 1999, David Held, Anthony McGrew, David Goldblatt, and Jonathan Perraton open by offering a typology of the different positions that different theorists of globalization may be said to hold, or what they call "tendencies": the hyperglobalists, the skeptics, and the transformationalists (Held et al., 1999). On page 10 of their introduction, they provide us with a very useful chart to make sense of the tendencies they identify.

The chart is legible by itself, but from it I think it is important to highlight three rows: first, driving forces of globalization; second, historical trajectory; and third, the summary argument. For the hyperglobalists, the primary driving force of globalization is what we can call "technocapitalism," by which I mean that capitalist expansion is predicated in the creation of both markets and new technologies to exploit labor power so as to maximize capitalist accumulation. For the skeptics, while there are tendencies to create transnational and global markets, these markets remain tethered to nation-states. If for the hyperglobalists nation-states are at

the service of global capitalism, for the skeptics, market and capital have remained dependent on and subservient to nation-states. For the transformationalists, neither markets nor the nation-state are the only forces bringing us together: there is the rise of a global media and a "global republic of letters," both national and transnational, and one may say "imperial" and "postimperial," "colonial" and "postcolonial" (Aschcroft, 2002) imaginaries that have enabled us to imagine ourselves members of "imagined communities" (Anderson, 1991). For the transformationalists, there is no one agent or vector of globalization.

As pertains to the row of "historical trajectory," for the hyperglobalists, globalization means the rise of a global civilization that is driven by commercialization and commodification, in which everything and everyone have been standardized: all airports look alike, as do all malls. For the skeptics, the historical trajectory can be understood along the lines of Samuel P. Huntington's combative *Clash of Civilization*s, at worst, or the rise of regional blocs: the Americas, the European Union, Eastern Europe or what was left of the Soviet Union, and those economies in the East under the aegis of China that may be considered an Asian bloc, and so on. For the transformationalists, the historical trajectory is one of what has been called "glocalization," the construction of global effects in distinct localities and regions. One may say that for the transformationalists, globalization produces the local and the local the global, thus leading to both integration and fragmentation.

Finally, with respect to the row dealing with the "summary argument": the hyperglobalists see the end of the nation-state, and the rise of a world economy; the skeptics argue for the endurance and perhaps even recrudescence of the nation-state and even its delinking from global economic networks; the transformationalists argue that globalization has given rise to new forms of governance, leading to the transformation of state power under the watch of what has been called the global regime of human rights and international law.

I have highlighted those three rows because by doing so we can notice that the differentiation of these three "tendencies," as identified by the authors, has to do with economic, political, and cultural power, and how these powers are projected, whether from above or from below, and with what reach, whether horizontal, across nations and continents, or only vertical within countries and regions. In other words, these three tendencies have to do with what kind of primacy you give to economics, the political, and the cultural. As useful as this typology is, however, I do think that it needs a fourth column, or "tendency," one that I would call the "mestizo/decolonial" tendency, which would include the postcolonial and decolonial thinkers who have developed their own critique of Euro-American globalization and their globalist theorists.[1] My addenda to Held, McGrew, Goldblatt, and Perraton's typology, and following their useful chart, may look like this:

In my typology of globalists, or globalization theorists, "mestizo/decolonial" theorists are neither glib hyperglobalists nor pessimistic skeptics, nor, and much less, (Pollyannaish) transformationalists, who think that globalization is always for

TABLE 6.2 Mestizo: Decolonial Globalist

	Mestizo/Decolonial Globalists
What's new?	The Global/Modern/Colonial System
Dominant features	Entangled, simultaneous, intensive and extensive, fragmented economic/political/cultural/linguistic integration
Power of national governments	Subordinate, puppet national government, or hypernational governments as response to both decolonization and ongoing imperialism
Driving force of globalization	Multilayered and nonsynchronous differentiated integration in which globalization from above is countered by local glocalizations and acculturations
Pattern of stratification	New global order of governance and the coloniality of Euro-American political force that is countered by that new glocalized global human rights regime
Dominant motif	The coloniality of all power (economic, political, cultural, and social)
Conceptualization of globalization	The reordering and integration of regional systems into a world system that is a colonial/global/modern system
Historical trajectory	Enduring dependencies within a growing integration and glocalization
Summary argument	Globalization is a fact of world history, but it assumed truly global proportions in the sixteenth century with the integration of the Americas and Africa through the conquest of the Americas and the rise of the slave trade and the plantation system—an all-too-often neglected factor in the globalization of the world.

the better of all, including former colonies. They are a much-needed corrective to all the excellent theorizing that has been done on globalization that has hitherto not factored in the role of the colonization of the so-called "New World," that is, the Americas, in a new world-system. In their introduction to their volume Held, McGrew, Goldblatt, and Perraton identify five major sources of contention among theorists of globalization:

- conceptualization;
- causation;
- periodization;
- impact; and
- trajectory of globalization (Held et al., 2000).

For mestizo/decolonial thinkers who theorize globalization, this means to think about what Quijano called the "colonial matrix of power," that is, the way in which the world-system that was configured by the conquest of the Americas and the establishment of the global slave trade gave rise to new forces of globalization (Quijano, 2008). For them, therefore, there is no single causation, but an ensemble of institutions that gave us the Global/Modern/Colonial System.

Consequently, for them the tower of global time (i.e., how chronologies of the rise of the modern global system must be temporalized) must be set to the sixteenth century, the time of the so-called invention/discovery of the Americas. For mestizo/decolonial global thinkers, the impacts have been indeed global, recurrent, and enduring, transforming the whole world. In terms of trajectory, as I noted above, for this group of thinkers, the trajectory is both more globalization (interdependence) and more glocalization (differentiated integration), or mestizaje and creolization.

Above, I indicated why I had highlighted three rows from Held, McGrew, Goldblatt, and Perraton's typology of globalists, namely because they allow us to see what I called three forms of power: economic, political, and cultural. My argument is that mestizo/decolonial global thinkers allow us to see another dimension of power, namely its coloniality, what Quijano called "the coloniality of power." This means that all power, whether it be economic, political, or cultural, is infused, articulated, telescoped, and circulated by the networks, dependencies, and uncouplings we inherited from globalizing colonization and colonial globalization.

PUBLIC SPHERES, IMAGINED COMMUNITIES, AND PUBLIC OPINIONS

In their impressive *The Coming of the Book: The Impact of Printing, 1450–1800*, Lucien Febvre and Henri-Jean Martin document how the book became a "force of change" already in the sixteenth century (Febvre & Martin, [1976] 2010: chap. 8). Their book could have easily been titled *The Revolution of the Book*. As they write: "Assuming an average print run to be no greater than 500, then about 20 million books were printed *before 1500*, an impressive total by 20th-century standards, and even more so when we remember that the Europe of the day was far less populous than now" (248–49). Then, they add later in the same chapter, "But the point is that by the 16th century the printed book had been produced in sufficient quantities to make it accessible to anyone who could read" (262). In his massive *The Nature of the Book: Print and Knowledge in the Making*, Adrian Johns offers one of the most impressive histories of the impact that "the book" had on English culture, focusing particularly on London (Johns, 1998). Febvre and Martin argue that the dissemination and commercialization of books allowed for the dissemination of scientific knowledge and new "theological" perspectives that fueled the Reformation. Their argument is that the now easily available and affordable book catalyzed both scientific and religious revolutions. The medieval book, which was mostly copied by hand in monasteries by monks, was a luxury item, available mostly to the clergy. Eventually, the hand-copied book gave way to the incunabula, the earliest printed books, also mostly produced for religious or ecclesiastical ends. With the development of cheap paper and mass printing, books could be disseminated across different professions. The book ceased to be an exclusive tool of the clergy. Febvre and Martin note in their book how the ratio of the possession of books

between lawyers and churchman essentially flipped between the fifteenth and sixteenth centuries. While their emphasis is on the book as a "force" of change, Johns's emphasis is on what we can call an "epistemic" revolution in the way we began to think of both knowledge and the object of knowledge that the book brought about. In Johns's estimation, the ascendancy and dissemination of the book led us to think of nature as a book, that is, the book of nature, one that is legible and can be read by all. The book democratized knowledge and epistemology: knowledge would be accessible to all and all could be epistemic agents, or at least this was the expectation (Johns, 1998: 1–57).

The book, as a mass-produced commodity, or as Anderson put it, "the first modern style mass-produced industrial commodity"´(Anderson, 1991: 34), brought about scientific and religious revolutions, but also political, social, and what we can call cognitive revolutions.[2] As Elizabeth L. Eisenstein has argued, the book was an element, albeit a key one, in the "communications revolution, or (most explicitly) a shift from scribal to typographical culture" (Eisenstein, 1968: 2).[3] All knowledge, what could be known, should be known, would be known, would be printed and made available to all. The book was a decisive element in the cognitive revolution that gave us the modern scientific, technological, and enlightenment world. Above, the book was an indispensable factor in the creation of reading publics that began to share a common literary world, or what Johns calls the "literatory life" (Johns, 1998: chap. 2).

Yet, as important as the book was in the "cognitive" revolutions that gave us the Global/Modern/Colonial System, it could be argued that the newspaper was even more decisive and impactful. If the book democratized knowledge and epistemology, the newspaper was even more effective in "democratizing" knowledge and constituting "a" people as agents of both knowledge and "opinion." In this way, the newspaper was indispensable in the constitution of the "people" not as an object of political power, but as a "subject" of political agency. Anderson notes that the newspaper was an "extreme form" of the book. Although books could become best sellers, their readership was circumscribed. They might become best sellers, but of a select readership. The newspapers, on the other hand, were and are ephemeral and yet ever present. Newspapers have morning and late editions, national and international editions, and until very recently, at least in the United States every major city or town had its own local newspaper. In this way, the newspaper was even more crucial in constituting what Anderson, following Hegel, calls a "mass ceremony." Anderson puts it in this provocative way:

> The significance of this mass ceremony—Hegel observed that newspapers serve modern man *[sic]* as a substitute for the morning prayers—is paradoxical. It is performed in silent privacy, in the lair of the skull. Yet each communicant is well aware that the ceremony he *[sic]* performs is being replicated simultaneously by thousands (or millions) of others of whose existence he is confident, yet of whose identity he has not the slighted notion . . . What more vivid figure for the secular, historically clocked, imagined community can be envisioned?" (Anderson, 1991: 35)

While we may appreciate the thrust of Anderson's claims in his rereading of Hegel's famous phrase about reading newspapers as the secular version of a mass ceremony—a figurative gathering of people under the roof of a virtual church—some corrections have to be noted. In contrast to books, which are privately consumed, newspapers were collectively and communally consumed. As Matthew J. Shaw notes in his book *An Inky Business: A History of Newspapers from the English Civil Wars to the American Civil War*, newspapers were available in coffee shops, beer halls, and as *affiches*, that is, as broadsheets that would be posted around the city and which would be read by gathered people, as if in an outdoor church. Above all, in the seventeenth and eighteenth centuries, newspapers would be read out loud by newspaper readers to those who were illiterate or just wanted a coffee or a beer while they caught up with the world (Shaw, 2021: 121). As Andrew Pettegree notes, "printed news" created new "habits of consumption," which linked the communal and the private (Pettegree, 2014: 11). The newspaper, more than any other "print" media, contributed to the creation of a "public" that concerned itself with what was "public."

Thus far I have discussed the material and cognitive revolutions that the book and the newspaper brought about, thus giving birth to our Global/Modern/Colonial System. In fact, and arguably, more than books, newspapers were major factors in the creation of "global" imagined communities. Simon J. Potter, for instance, notes that newspapers were instrumental in projecting a global sense of Englishness, while also giving rise to local appropriations. Just as London became the metropolitan and imperial center of news, every colonial and imperial outpost developed its local or national newspapers (Potter, 2007: 621–46). Newspapers both globalized and glocalized. As Shaw shows, newspapers were very much "an instrument" of the nation-state-building process, and thus were decisive in the rise of nationalisms (Shaw, 2021: 14). At the same time, as newspapers integrated "empires" and "colonies," they contributed to their distinct identities, and eventual emancipation and independence, as was exemplified by the U.S. declaration of independence from England. And, just as importantly, if not more, the globalization of the newspaper created another, or a newer, epistemic crisis: the crisis of veracity. In the age of the mass production of news and the proliferation of newspapers with their angle to peddle, there arose what we can call an "epistemic legitimation crisis." As Pettegree shows eloquently, the rise and world dissemination of newsprint brought about the question of the reliability of the news (Pettegree, 2014: 4–8). Thus, the newspaper had centrifugal and centripetal effects: it created "publics" that were also "critical" of the very media that held them together as a public.

The communications revolutions brought about by the print revolution also had revolutionary impact on the political as such, which manifested itself in the emergence of the "public," "public opinion" and "publicity," "publicness," and the "public sphere" (*Öffenlichkeit*).[4] Jürgen Habermas, like no other philosopher and social

theorist, already in 1962 in his classic *The Structural Transformation of the Public Sphere: An Inquiry into a Category of Bourgeois Society*, diagnosed and laid out the momentous emergence and transformation of this new entity, the public, and its form of reasoning: public reasoning (Habermas, 1989a, 1989b). For Habermas, at the most basic level, "the public sphere" appears as "a specific domain—the public domain versus the private" (Habermas, 1989b: 2). The bourgeois public sphere "may be conceived above all as the sphere of private people come together as a public; they soon claimed the public sphere regulated from above against the public authorities themselves, to engage them in a debate over the general governing relations." This debate took a "peculiar" and unprecedented form: "the people's use of their reason (*öffenliches Räsonnement*)" (Habermas, 1989b: 27). The public sphere, then, became the sphere for the "people's" use of public reason in order to grant legitimacy to the exercise of political power. The public use of reason in the public sphere then became a means for the transformation of *voluntas* into *ratio*. "*Public debate was supposed to transform* voluntas *into a* ratio *that in the public competition of private argument came into being as the consensus about what was practically necessary in the interest of all*" (Habermas, 1989b: 83; italics in original). Public reasoning within this new social space would domesticate political power by submitting it to public debate. A people as a public reasoning within the public sphere claimed the power of supervision over government, demanding that decisions be made public. In this way, the public sphere became an engine for the transformation, and generation, of political power (Habermas, 1989b: 136–42).

Bernhard Peters, a former colleague of Habermas, offered a synoptic overview of this momentous "category" by highlighting three distinct functions. First, when combined with its counterpart concept, namely the private, the public demarcates domains of social action with their respective "normative powers"—to use that expression by James Bohman (2007: 34–35). Second, when combined with two other counterconcepts, "private" and "secret," they demarcate distinct domains of communication and knowledge. We may then say that "public" also has an epistemic characteristic that calls for a certain kind of communication, that is, civil and public communication. Third, combining the two prior semantic characteristics of the public, and to quote Peters: "The public sphere here denotes a kind of collectivity with a particular communicative structure, or a sphere of communicative action with specifically demanding characteristics and functions" (Wessler, 2008: 33–34).

Habermas's classic from 1962 was, of course, published before his Magnus Opus, *The Theory of Communicative Action* from 1981 (Habermas, 1984–87). Yet, it can be argued that elements of the latter work were incipient in the former. Indeed, using the terminology that Habermas would develop later, one could say that the public sphere was the horizon for communicative action, rationality, and communicative freedom. The public sphere, as a new social space with its own normative claims and powers, brought forth the idea of the publicness of reason,

of the specific use of "public" reason. In his superlative book *Öffentlichkeit: Die Politische Form des Bewusstseins* (Public Sphere: The Political Form of Consciousness), Volker Gerhardt, with the subtitle to his book, captures powerfully what Habermas meant when he argued that the public and its public sphere were a means of transforming political power into something that had to be generated by the public through public deliberation. Gerhardt also captures succinctly and poignantly the cosmopolitan intent of Habermas's notion of the publicness of the public use of reason when he concludes his book with the chapter "Der Weltbürger als *homo publicus*," that is, "the world citizen, or cosmopolitan citizen, as public human" (Gerhardt, 2012: 504–51).

It is well known that Niklas Luhmann was one of Habermas's most formidable antagonists and critics. They engaged in a famous debate in the early seventies from which one could say that Habermas learned more than Luhmann.[5] It is often overlooked that Luhmann contributed to the conceptualization of the public, public opinion, and the public sphere. Luhmann's position, however, is almost the polar opposite of Habermas's. Luhmann also recognized that major social transformations had taken place in the seventeenth and eighteenth centuries because of the media revolutions of those centuries. The new mass communication enabled by mass media created both a public and the public sphere, which in turn brought about a new social system. The public, the public sphere, and public opinion were social forms that enable the social system to create a social reality—environment—that enables the social system to observe itself. These were mirrors of mirrors, observations of observers, which in fact created the form of the "observer." For Luhmann, "public opinion" was "stylized as a paradox, as the invisible power of the visible" (Luhmann, 1990: 204). Most importantly, public opinion refers to the social system, and not to what may take form in the consciousness of citizens. Public opinion is the autopoiesis of the social system that is constituted by communications, and only by communications. These communications are not transfers of information, reports, or revelations from one agent to another. The communication is without communicative contents. It is merely its performance. "Communication is the creation of an emergent reality, namely society, that, for its part, resides in the continual reproduction of communication by communication" (Luhmann, 1990: 207). Therefore, according to Luhmann, public opinion, as the communication of communications, "renounces" both rationality and the irrationalities of "mass psychology" (Luhmann, 1990: 209). Nor, under the form of the freedom of the press that shapes public opinion, can it be a guarantee of "a free life of the mind" (Luhmann, 1990: 217). The media does not inform the mind, nor is it a means for constituting a "mind."

In a later text, Luhmann would claim that mass media creates a Kantian "transcendental illusion. According to this understanding, the activity of the mass media is regarded not simply as a sequence of *operations*, but rather as a sequence of *observations* or, to be more precise, observing operation" (Luhmann, 2000: 4).

This is the social system observing itself observing. In this later text, the paradox of the invisible power of the visible now become another paradox:

> However, the involvement of the mass media is indispensable when the point at issue is widespread dissemination and the possibility of anonymous and thus unpredictable uptake. As paradoxical as it may sound, this means not least, when it is a matter of generating *non-transparency* in reaction to this uptake. The effect if not the function of the mass media seems to lie, therefore, in the reproduction of non-transparency through transparency, in the reproduction of *non-transparency of effects* through the *transparency of knowledge*. This means, in other words, the reproduction of the future. (Luhmann, 2000: 103; italics in original)

Here, Luhmann seems to be echoing what Pettegree noted, namely that with the rise of the newspaper, the problem of the veracity and reliability of the media also arose. Mass media, by producing immense amounts of news and information, created the problems of what information is relevant and which news sources are reliable. In his two-volume work, *Gesellschaft der Gesellschaft* (which should be translated as the *Society of Society*), the summation and systematization of his social systems theory, Luhmann writes that public opinion is "neither mere fashionable opinion, as the seventeenth century saw it, nor the medium of rational enlightenment or *puissance invisible* expected to bring emancipation from tradition in the eighteenth century. It is the medium of self-and world description of the modern world. It is the 'Holy Spirit' of the system, the communicative availability of the results of communication" (Luhmann, 2012: 322). Thus, for Luhmann the public sphere, the public, and public opinion are not the social space where a public engages in rational deliberation, thus attempting to transform political power, or the bifurcation of two realms (private and public) with their respective normative powers. For Luhmann, on the contrary, what mass media gave birth to is to what Walter Lippmann called "phantom publics" with their respective opinion, which have neither epistemic nor rational value, nor any emancipatory character (Lippmann, 1993). Yet, Luhmann has diagnosed several of the paradoxes that are concomitant with the rise of mass communication: first, that in the name of publicness new unpublic spheres and societies emerged; second, that the public fragments, creating many publics, with all of them not necessarily sharing the same information or opinion; third, that the opinion held by these publics is as ephemeral as the news that these publics consume; fourth, that mass communication allows for the communication of massive amounts of knowledge, creating a tower of Babel with its own epistemic legitimation crises; fifth, and most poignantly, that the public sphere that was enabled by mass communication is neither the space of rational deliberation nor for the public use of reason. Most tellingly, Spanish sociologist Ignazio Izuzquiza Otero titled his comprehensive study of Luhmann *La Sociedad sin Hombres: Niklas Luhmann o la Teoría como Escandalo* (Society without Men: Niklas Luhmann or Theory as a Scandal). Indeed, notwithstanding

his voluminous oeuvre, at the center of it is not human consciousness, freedom, emancipation, liberation, or deliberation or reason (Izuzquiza Otero, 2013). The autopoiesis of the social system does not require human consciousness, the life-world, or the practices of communication to perpetuate itself. If anything, human consciousness is a mirage, not unlike the "Holy Ghost" (Key, 1961: 8).

ON THE MEDIATIZATION/CARNIVALIZATION OF POLITICS AND EPISTEMIC DEFICITS OF THE NEW PUBLIC SPHERES

In this chapter I have been weaving a story, with a normative intent, about globalization(s), by arguing that we must consider the mestizo/decolonial global thinkers as contributing substantive insights into the Global/Modern/Colonial System, or what we can also call the coloniality of globality. Then, I turned to a consideration of the media revolutions of the fifteenth, sixteenth, and seventeenth centuries, focusing on the book and newspapers, so as to arrive at what we can see were interconnected political, social, cultural, epistemic, and normative revolutions. These revolutions, the argument has been, were crystallized in the emergence of what Habermas called *Öffenlichkeit*, with all of its cognates and semantic spin-offs. Like the prior section, this third section had a focus on material conditions of possibility and how they released new normative powers and standards. The media revolutions of the last nearly six hundred years have transformed how humanity sees itself, "observes itself observing itself," to use Luhmann's language, but also how it generates new normative demands. In this last section, I want to turn to the question: What has happened to globalization and the public sphere in the age of computerized, Internet-enabled social media? Are we more or less globalized and still members of a reasoning and deliberating public(s)? In the age of social-media-mediated globalization(s), what happened to the reasoning public, which in Habermas's estimation was related to the epistemic virtues of an informed, egalitarian, and deliberating public?[6]

Here, I want to follow but digress a bit from James Bohman's important contributions, already cited. In his 2004 essay "Expanding Dialogue: The Internet, The Public Sphere and Prospects for Transnational Democracy," Bohman considers the, then, utopian promises of a digital democracy enabled and potentiated by the Internet (Bohman, 2004: 131–55). While Bohman was sanguine about the utopian dimensions of the new technologies, already back in the early 2000s he noted that these new Internet-meditated interactions were having fragmenting and inegalitarian consequences. Above all, they were contributing to the fragmentation of the public sphere into public spheres, siloed and isolated publics, that eroded and etiolated the possibility of coalescing and gave rise to "public opinion." In order to explain why this is the case, Bohman offers a brief sketch of how media technologies have transformed modern societies' ability to communicate. He

makes a distinction among one-to-one, one-to-many, and many-to-many forms of communication as enabled by ever more sophisticated systems of communication—although all of these possible forms of communication required material wherewithal: the runner who brought a message, the horse, the ship, the train, the telegraph, radio, television, and so on. This typology needs to be modified in view of our new social media, especially as it is enabled by the cell phone and up to 5-gig wireless networks. Living in the age of cheap, portable, and ubiquitous cell phones allows us to see that there are new modalities of communication: one-to-one, some-to-some, one-to-many, many-to-many, and no-one-to-all (as in the bots that produce and disseminate fake news and misinformation). The last two forms of communication are what is truly revolutionary in our time. The cell phone rendered all communication flat and horizontal, while also decentering and disseminating it. This is what translated into the Aesopian dream of a digital democracy with a vibrant public sphere. Yet, the Internet, the cell phone, mass social media, Tik-Tok, et cetera have given us a digital version of what Lippmann called "phantom publics." Worst yet, and as we have witnessed in the last decade, new forms of misinformation, fake news, and conspiracy theories have inundated the Internet, exacerbating what I called above the "epistemic legitimation crisis" of our global societies. Arguably, "fake news" was born with the news. Yet, we have entered a deep fog of (mis)information wars. To better illustrate what I mean, let me become a bit provincial.

Several media revolutions have taken place in the U.S. public sphere, which has been the main driver of the rise of computer-mediated communication, nonstop news, social media, and the cell phone. Arguably these revolutions date back to the launching of CNN in 1980, and to that of Fox News in 1996, which was supposed to counter the alleged liberal bias of the former. CNN would broadcast 24/7, using a format that transformed journalism. This format entailed interviewing "experts" who would present different, even competing and contrasting, opinions, perspectives, and analyses on whatever was in the news. Cable networks brought about an epistemic shift in how the news was presented and received, televised, and consumed. They turned the news into a spectacle. And further, they contributed to the undermining of the epistemic credibility of scientists and experts—that is, credible epistemic agents.

Both CNN and Fox News made it clear that the news was not simply to be reported, but in fact manufactured. They showed that everything depends on a perspective, on one's "angle." They showed that "news" is in the eye of the beholder, and that different eyes see different things—in fact, they may see radically different things. The "news" was no longer what was "new" every day, but what broadcasters decided was newsworthy. The relentless broadcasting of the news, the ceaseless updates on the news, the "breaking news," the endless updates on the "developing" story, made it clear that what was the "news" one hour was always already old by the next one. In this way, the news was never "new" enough. But the uproar and

cacophony of the news also had psychosocial effects. It created a sense of menace and unease: something was always "breaking" in the world. Another consequence of the rise of 24/7 reporting was the deprofessionalization of journalism, which contributed to the carnivalization of the news. The "news" became a spectacle, a mixed martial arts match, in which personalities and experts from the Left and Right exchanged opinion-punches. All of it infantilized the news, and viewers.

With the launching of "social media" and expanding access to the Internet, five trends converged to create a new phenomenon in the U.S. public sphere: media bubbles. The five trends, potentiated by 24/7 news media, are: *subjectification*, the idea that news is in the eye of the beholder; *manufacturing*, the notion that the "news" is not reported but made by cobbling certain perspectives together; the *deprofessionalization* of journalism, which showed that one does not need to be an expert to have an opinion or perspective on what may or may not be newsworthy; fourth, the embrace of *communicative combat*: the more Rabelasian, bawdy, vulgar, and outrageous you were, the more viewers and "likes" you would receive; and, last but certainly not least, the emergence of what we can call *digital time*, that is, the time that preempts the time of deliberation and has infused in the public attention deficit disorder. This *digital time*, incidentally, is antidemocratic time, as it is a nontime of deliberation, a time of gut reaction. This phenomenon, beyond this chapter, is as important as the epistemic legitimation crisis brought about by the production of digital misinformation.

The logic unleashed by CNN, which needed its nemesis Fox News, spawned a plethora of news channels, each with its unique brand and ideological bent. If Fox News meant to counter the alleged liberal bias of CNN, a hundred other channels would counter the belligerent conservative and Republican tenor of Fox News. Civil discourse was almost nowhere to be found. Many networks took their messages directly to the Internet, where many new "news" sites began to appear. For every CNN and Fox News, a new Huffington Post (2005) or Breitbart News Networks (2007) sprouted. The old bifurcation of the public sphere between print and televised media gave way to yet another form of media: Internet media. Print media now had to compete with television media, which in turn had to compete with Internet media, a platform that certainly does not require the high overhead required by the other two forms of journalism. This catalyzed an already accelerating fragmentation and polarization of the public sphere. Suddenly each political taste could have its own channel, each subjective inclination its own platform. In a unique way, political gerrymandering, which allows politicians to select their electorate rather than the other way around, was mirrored and exacerbated by what is now taking place on social media: news channels are picked by the kind of "news" you want to consume.

Another technological revolution catalyzed social media, and this was the rise of the cell phone or so-called "smartphone." Introduced in 1992 by IBM, but popularized and fully digitized by Apple in 2007, when the company released its iPhone,

the device has transformed not just the news, but also politics. Obama was the first president to make use of the smartphone, and all of the "apps" it ushered into the public sphere, such as Twitter, Tik-Tok, etc. It is noteworthy that Obama did tweet and, according to the Internet, his account is the most followed of all time, with 130 million followers, compared to Trump's 15.6 million. The smartphone transformed "first" (television) and "second" screens (the computer) into a "third screen" (the mobile TV/computer), which also became both a mobile panopticon and a traveling pulpit with a megaphone. Now, anybody could follow their favorite news story, sitcom, or social media personality through instant notifications from Instagram (as of 2010) or Twitter (since 2006) or Facebook (since 2004). Every cell phone allows for a myriad of notifications.

These media revolutions, which have structurally transformed the U.S. public sphere, and arguably the World Society public spheres, enabled the weaponization of Donald Trump, the person, into Trumpism, the political phenomenon. Trumpism transcends Trump the individual. In many ways, Trump is the avatar of Trumpism. And Trumpism is a global phenomenon that manifests itself in other similar forms.

It is not coincidental that Trump is the first president to have benefited by capitalizing on a thoroughly fragmented public sphere, with media bubbles that catered to specific ideological interests. While Obama availed himself of the Internet, social media, and Twitter, he did not use these media to conduct his administration's politics. Obama could not have used tweets in that manner because he understood he was beholden to a superior normative standard. Trump, unlike Obama, was explicitly aided by news media outlets like Fox News, Breitbart, and numerous other right-wing media outlets, websites, and personalities, such as Steven Bannon. Trump was the first president to conduct policy and make public announcements largely through Twitter. He also used TV shows to conduct some of his putative "presidential" briefings.

While "fake news"—a favorite term of derision for Trump—already existed in print media, the emergence of social media, Internet news, Twitter, and all the other virtual venues to deliver "information" (e.g., Facebook's Newsfeed) escalated the production and dissemination of misinformation. Other phenomena that belong with "fake news" are the proliferation and dissemination of conspiracy theories. Trump was adept at labeling anything that he disliked or that challenged him, especially when he was very blatantly lying, "fake news." He was also adept at capitalizing on the "liar's dividend," and at using "conspiracy theories" to his benefit and to the detriment of those he opposed or sought to undermine. He tweeted his lies and retweeted right-wing conspiracy theories. Since these were tweets, they were his speech, not formal official declarations. From reports of former White House employees, we also learned that Trump was a daily consumer of right-wing and conservative media, such as Fox News. Trump may have been the first "white president" insofar as he ran on an explicit agenda of white supremacy,

racism, xenophobia, and anti-immigration, but he was able to push this agenda because he was also the first social media and Twitter president. Trump was the avatar of right-wing social media. Like Ronald Reagan and George W. Bush, the Teflon presidents before him, Trump also became a Teflon president. But a better analogy would be to say that Trump is more like a "third screen" that you could click on or swipe away; you could like his tweets and retweet them, or look away; you could swipe to the left or to the right, as if he were just another profile picture on a dating app (Match.com, or Cupid). Trump is the metonym for a new phenomenon: "digital agnotology," namely the digital production of epistemic deficits, incredulities, epistemic bubbles, and self-incurred ignorance.

Still, as I am writing this, I can watch on CNN (which has become a global brand with global reach) the terrible destruction of Ukraine by Russian troops, the masses of people leaving the country, the indiscriminate attacks on civilians, the crimes of war being committed right before our eyes. Every day, we can hear updates on NPR about President Biden's economic plan to rebuild the United States. Yet, we also hear about the media being shut down in Russia, the iron grip on the Internet by the Chinese Government, and the waves of misinformation about what is going on around the world. The media revolutions of the fifteenth and sixteenth centuries gave us the revolutions that globalized our world, while also giving us the nationalisms that shape the direction of those globalizations. In parallel, the new media revolutions have brought us together in unprecedented ways, but also sundered and separated us in new and unsuspecting ways. We are globalized too much and not enough.

In this chapter, I profiled what I called "mestizo/decolonial" theories of globalization that are a major corrective to most theories of globalization that are projected and thought as if from above or only from the perspective of Euro-America. I argued that these "mestizo/decolonial" thinkers enabled us to rethink the "coloniality of globality," which articulates the perspective from the underside of modernity, globalization, and colonialism. Then, I turned to a consideration of the rise of both national and transnational public spheres, through the emergence of newspapers, and what has been called a "world republic of letters." Part and parcel of this revolution in media was the emergence of both imperial and colonial public spheres, with their distinct media. Thus, as we came to be part of "imagined" global communities of readers, many colonial subjects developed their own local media. Thus, colonization was a major force of globalization, which in turn catalyzed the creation of "decolonizing" publics and public spheres. The global public sphere is always a sphere of many publics, many of them explicitly and avowedly decolonizing or anticolonial. Then, I turned to what I called "the latest" or more recent "structural transformation" of these global public spheres by looking at the rise of social media and the impact that cell phones and the Internet have had on politics. In particular, I focused on the rise of authoritarian, xenophobic, racist, and antiglobalist publics with their own distinct politics, which have been

enabled and exacerbated by these new media. These new social media, I sought to show, globalized us while also glocalizing us into more nationalistic and xenophobic political attitudes and trends. Again, my claim is that the new material conditions of the production of the public sphere, and publics, show how we are globalized enough, but also not enough.

NOTES

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1. For my use of *mestizo*, see Gruzinski (2002), and for an overview of the "decolonial" critics, see my article "Critique of Decolonial Reason" (Mendieta, 2020). The best resource for the decolonial critics is Moraña (2008). Decolonial thinkers are not postcolonial thinkers, yet they are in intense dialogue with them. As for postcolonial theory, see Moore-Gilbert (1997), Gandhi (1998), and Quayson (2000).

2. And the book continues to be an agent of transformation and a transformed medium. For further thoughts on this, see my essay "From the Paperback to the Ebook" (Mendieta 2021).

3. Eisenstein's essay is an amazing text that in my view anticipates and advances some ideas later developed by Jack Goody in *The Logic of Writing and the Organization of Society* (Goody, 1986).

4. See my entry "Public Sphere" in *The Cambridge Habermas Lexicon* (Mendieta, 2019). See also Beebe (2002). And of course, Calhoun (1992), the indispensable companion to Habermas's classic.

5. See the excellent book on this famous debate by Gorm Harste (2021). See also Moeller (2019).

6. See Habermas (2009), an essay that was dedicated by Bernhard Peters and that should be read as a new preface to *The Structural Transformation of the Public Sphere*.

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PART TWO

Globalization: Present

7

Globalization and Health in the COVID Era

Jeremy Youde

ABSTRACT
In 2019, I published my book *Globalization and Health*, which looked at the relationship between these two key concepts. In it, I argued that globalization may increase our vulnerability to infectious disease outbreaks, but it also provides us with the tools and opportunities to stop disease outbreaks before they spread too quickly. A few months after the book was published, the global COVID-19 pandemic began. In this chapter, I reflect on how the book's arguments hold up in light of our collective lived experience with the pandemic since 2019. I highlight three areas in which the interplay between health and globalization(s) deserves greater attention, and I take myself to task for not giving more direct and explicit attention to the international political economy of global health.

KEYWORDS
gender, global health, globalization, international political economy, multilateralism, One Health

In the summer of 2019, I had the good fortune of seeing my most recent book, *Globalization and Health* (Youde, 2019), appear in print. The core message of the book was that the ease and speed with which people and goods can cross borders thanks to globalization may increase the chances of an infectious disease outbreak, but globalization also provides us with the sort of knowledge and connection that can allow us to work together to stop such outbreaks relatively quickly.

It is safe to say that no one foresaw that a global pandemic caused by a brand-new disease would begin mere months after the book's publication. That is not to say that anyone would have credibly argued that global pandemics were a thing of the past; indeed, just a month or so after my book came out, the online news site

Vox published an article with the ominous title "The Next Global Pandemic Could Kill Millions of Us. Experts Say We're Really Not Prepared" (Samuel, 2019). Even with these warnings, there was little sense of global urgency when the Wuhan Municipal Health Commission issued two emergency notices on December 30. 2019, about a new unknown pneumonia (Worobey, 2021: 1202). Unfortunately, we are now all far too familiar with the subsequent political, economic, and social effects of COVID-19.

This chapter represents an exercise in scholarly reflexivity (Amoureux and Steele, 2016). Too often as scholars, we neglect to reflect on what we got right and wrong. For better or (very much) worse, the emergence of the COVID-19 pandemic and the international response provided a very direct test of the assumptions I embedded in my book about the relationship between globalization and health and what would happen when push came to shove.

Prior to the pandemic's emergence, one could argue that the scholarly consensus acknowledged many significant shortcomings in the global health governance architecture that had developed since the early 1990s, but that there was a general acceptance of the international norms that governed health-related behavior (see Davies, Kamradt-Scott, & Rushton, 2015). At the same time, though, there was a growing concern that the impulse toward multilateralism that is at the heart of global health governance was fraying. While the election of Donald Trump and his openly antagonistic attitude toward any sort of international political agreement was perhaps the starkest evidence of this shift, it was not the cause of this morass. The global response to COVID-19 is instead the unfortunate, albeit understandable, outcome of years of unresolved tensions and a long-standing unwillingness to reform global health governance institutions. These issues highlight the ongoing tensions between the need to address global challenges on a more collective basis with the desires of governments to retain their sovereign decision-making. As a result, member-states hesitate to reform institutions created in very different geopolitical and economic circumstances—even when such stasis comes at the cost of creating more effective institutions.

In the case of the underexplored and unresolved issues that I identified at the end of *Globalization and Health*, I would argue that all three core aspects mentioned—the role of gender in responding to global health issues, the interplay between human and animal health, and rising skepticism about multilateral responses to global crises—were accurate and relevant, but missed out on the bigger-picture issues. In particular, my analysis did not adequately examine the depths of skepticism about multilateral responses among certain key actors. It also failed to sufficiently interrogate just how brittle and hamstrung global health governance institutions would be—due to both their own inadequacies and the shackles placed on them by powerful actors. Additionally, I failed to examine the extent to which international political economy—especially when it comes to issues of intellectual property rights and pharmaceutical manufacturing—would determine the course of a global response and its efficacy.

In this chapter, I want to briefly explore how the three underexplored issues that I identified at the end of *Globalization and Health* have played out in the face of the ongoing COVID-19 pandemic and why ignoring international political economy was such an oversight. These issues will continue to challenge the interplay between globalization and health now and into the future unless we seriously address them—and figure out how to balance national sovereignty and the need for collective responses to address pressing problems.

GENDER AND GLOBAL HEALTH

Academic work on global health politics, including my own, has paid far too little attention to gender. This is not to say that it has been completely ignored (see, among other great works, Davies & Bennett, 2016; Harman, 2016; Hawkes & Buse, 2013; Vaittinen & Confortini, 2019; and Wenham, 2021), but rather to call attention to the fact that, like in so much work in international relations, gender is frequently relegated to a secondary or tertiary level of importance.

Our collective unwillingness to center gender more fully within our analyses of global health politics leads to detrimental consequences. Colleen O'Manique stresses, "Social and political life is profoundly gendered, and feminist scholarship has a crucial role to play in illuminating both the foundations of health insecurities and the effects of insecurities on differently gendered and located bodies" (2015: 48). Gender powerfully affects the ways in which a person experiences health and health care, and access to health and health care is mediated by the social, cultural, and power relationships that are inextricably linked to gender. These effects become even more profound in the context of globalization.

Including gender in our analysis of global health politics calls attention to a number of key issues. For example, most responsibilities for taking care of the ill, in both formal and informal settings, fall to women. As a result, global health policies rely heavily on this uncompensated labor, even though the institutions promoting those policies rarely (if ever) acknowledge this reliance (Davies et al., 2019). This can have a very direct effect on the ability to implement policies as they have been devised—and the failure to do so is thus frequently chalked up to "noncompliance" rather than understanding the broader political, economic, and social conditions that women are attempting to navigate (Farmer, 1999: 247–70). The failure to mainstream gender as part of an institutional response to global health emergencies also leads to tone-deaf policy responses. During the Zika epidemic in Central and South America, many governments in the region cautioned women to avoid pregnancy—yet this advice wholly ignored the lack of access to reproductive health and abortion services, nor did it account for the prevalence of sexual violence perpetrated against women (Wenham et al., 2019). As a result, we end up with (at best) impractical policy guidance—and a ready excuse to blame women for "failing" to comply with government advice if they happen to fall pregnant.

Gender has played a significant role in how governments have responded to COVID in a variety of ways. In a transnational feminist political economy evaluation of policies in China, Hong Kong, Canada, and the United Kingdom, Julia Smith et al. (2021) find strong and consistent evidence that structural conditions disadvantage women both in terms of their exposure to the pandemic because of the reliance on women as frontline workers and caregivers in the home and in terms of policies that directly deny women personal, health, and economic security. They highlight that these inequalities are further exacerbated because of the intersectional connections with racism and other marginalizations.

More broadly, Ginette Azcona et al. raise important questions about whether COVID will erase the hard-won gains that have been made in recent years in promoting gender equity and life conditions for women that are a part of the Sustainable Development Goals. Efforts to reduce poverty, improve access to quality education, promote gender equality, provide decent work and economic growth, and reduce systemic inequalities are all innately gendered, so having backslid on these SDGs during the pandemic will necessarily have direct and negative effects on women and nonbinary people. They stress, "Though a particular microbe or disease may not discriminate, they exist in societies that do" (2020: 2). As a result, any policy that does not take gender seriously can exacerbate these inequalities—even if the policy is seemingly "gender-neutral."

These findings all point to the need to center feminist analyses more firmly within the global health politics literature. Assuming that policies are gender-neutral will lead to a host of unintended consequences, and a gender lens is vital in helping us to understand the success or failure of particular policies.

ANIMALS AND HUMANS AND MICROBES, OH MY!

The global health governance system is designed almost exclusively to focus on human health, but that ignores the realities of the interplay between human, animal, and environmental health. An estimated 60 percent of all human infectious diseases, and 75 percent of new or emerging infectious diseases, are zoonotic in origin (Salyer et al., 2017). Climate change exacerbates these problems, as it alters the zones in which insect vectors can live, changes the environmental conditions in which animals live, and can increase the opportunities for human-animal exchanges to occur (Epstein, 2005). All of these interconnections make it all the more important that we have institutions that can work across disciplinary boundaries, but also make facilitating such connections all the more difficult.

The concept of One Health brings human, animal, and environmental health together to recognize the interconnections and the need to blend analyses together if we are to make progress (Centers for Disease Control and Prevention, n. d.). The idea of One Health initially emerged in the mid-1960s, when veterinarian Calvin Schwabe wrote about the interconnections between human and animal

health under the moniker of "One Medicine." Over the next forty years, the idea of linking human, animal, and environmental health received greater attention. In 2004, the Wildlife Conservation Society sponsored a conference in New York called "One World, One Health." This conference developed the Manhattan Principles, which are twelve recommendations for creating a more holistic approach for improving health and biodiversity. Four years later, the Food and Agriculture Organization (FAO), World Organization for Animal Health (OIE), and World Health Organization (WHO), among other international institutions, developed a One Health framework, and each organization has subsequently created initiatives to further the aims of integrating human, animal, and environmental health in an effort to better protect all three (Gibbs, 2014). Though the intellectual work on this concept has been incredibly important, it has not necessarily translated into a change in institutional structures in a substantial manner.

The COVID-19 pandemic has demonstrated why it is so important to work on human, animal, and environmental health simultaneously. Our best understanding about COVID's origins, as I write in mid-2022, is that the virus made its way from bats to humans via another unidentified nondomesticated animal species sold for human consumption (Zimmer, 2021). As people come into closer contact with animals due to habitat destruction and meat-based diets, the likelihood of a disease making the jump from animals to people increases. This is also consistent with other new and emerging infectious diseases, such as Middle East respiratory syndrome (MERS) and severe acute respiratory syndrome (SARS), both of which are caused by a coronavirus related to COVID and believed to be of animal origin (Gong and Bao, 2018).

The existence of animal reservoirs for human diseases complicates strategies for combating outbreaks, as they give viruses a place to circulate until they have the opportunity to jump to humans. To put it bluntly, the presence of animal hosts means that we will never completely wipe out COVID-19. As a result, we need to think about our current global strategies to address the disease. The larger structural problem in global health governance is less focused on the internal workings of any particular institutions, but rather on the ability of different institutions to work together effectively. WHO's mandate focuses on human health, while the OIE pays attention to animals and the United Nations Environment Program (UNEP) looks after the global environment. All three should be intimately linked in addressing (post-)COVID, yet collaboration among the three remains relatively weak—to our collective detriment. From a global governance perspective, the problem is that there is no single organization focused solely on One Health. As a result, it can easily fall through the cracks or be deprioritized as organizational leadership changes. No organization has ownership over the issue, so One Health's place on the global health agenda is uncertain—and that means fewer human and financial resources are devoted to such collaborations. If recent reform efforts within WHO are any indication (Guarascio, Hunnicutt,

& Nebehay, 2022), there is not enough appetite within the global community to address this oversight. Again, we witness a situation in which the need for a collective response comes into conflict with the desire by (some) governments to privilege their sovereignty.

STAND TOGETHER OR FALL SEPARATELY?

The global health governance system is largely premised on norms that emphasize multilateralism, cooperation, and provisioning global public goods. Sadly, if there is any one issue that definitively hampered our collective global response to COVID, it is the mistrust (or distrust) of global health institutions by key players in the early days of the pandemic. This caused members of the global community to spend vital time when the pandemic was first emerging to fight amongst themselves and trade recriminations while the virus continued to spread. Viruses may not care about our politics or borders, but they can certainly take advantage of them.

When I wrote the book, it was clear that the Trump administration had little interest in global health governance. Perhaps unique among America's multilateral commitments, the Trump administration evinced an abject and overt hostility toward global health. While I tried to make an argument to the Trump administration to engage with global health on securitized grounds in the book and another article (Youde, 2018), they did not heed my advice. Indeed, Trump's antipathy toward WHO went far beyond what I expected—and it had direct effects on the global community's ability to respond to the COVID pandemic.

The emergence of COVID exacerbated Trump's America First mindset, his distrust of multilateralism, and his dismissal of global health. Though Trump initially gave the Chinese government praise for its response to the emergence of COVID (Riechmann, 2020), he and his government officials soon blamed China for the disease and described COVID in racist terms in public statements and at political rallies (which had the knock-on effect of encouraging discrimination and violence against Asians and Asian-Americans in the United States) (Itkowitz, 2020; Zhou, 2021). By April 2020, a few months after the pandemic began, Trump was lashing out at WHO, calling it "China-centric" and saying that it "called it wrong." At a press conference that month, he made his first public threat to pull the United States' funding for WHO and withdraw the country from the organization (Wamsley, 2020). Finally, in July, the Trump administration sent notice to WHO of its official intention to withdraw from the organization in one year (Rogers & Mandavilli, 2020). While the WHO's Constitution does not contain any formal mechanism for a country to withdraw from the organization, a 1948 joint resolution passed by the U.S. Congress gave the American government the right to leave WHO if it gave a year's notice (Congressional Research Service, 2020: 2). Even if President Trump had the authority to make such a decision (and this is an ambiguous and debated point), global health scholars and policy makers roundly

criticized the decision as threatening American and global health (Gostin et al., 2020). None of this absolves China of its desultory engagement with the WHO, but when the country that has been the largest provider of development assistance for health and the largest single contributor to the WHO rejects the leading global health governance institution in the midst of a crisis, it sends a signal to international partners—and that signal can last a long time and further undermine efforts to arrive at collective responses to a crisis that requires cooperation to address.

In one sense, Trump's decision to pull the United States out of the WHO was the ultimate expression of a fit of pique. The WHO largely stayed silent in response to Trump's decision, trying to wait out the election to see if temperatures cooled (P. Huang, 2020). Administration officials floated the idea of creating new U.S.-led health organizations to replace WHO, but there was little appetite for such a change among other governments and the efforts went nowhere (Rotella, Bandler, & Callahan, 2020).

In the end, we might be tempted to think that this was more about bluster and electoral posturing than consequence. After all, Biden canceled Trump's withdrawal order on his first day in office. This view, though, misses the larger consequences of the Trump administration's efforts. In those initial months of the COVID pandemic, valuable time was lost to internecine fighting. Instead of building a united front, we had leading world powers hurling insults at each other—and at the organization with a mandate to respond to global health emergencies.

Yet the latter is precisely why we create international institutions. We need them there laying the groundwork and building relationships so that they can spring into action when emergencies occur. It is surely better to have a fire department that trains ahead of time so that it is ready to respond when a fire breaks out than trying to cobble something together for the first time when a building has gone up in flames.

The fact that we have faced such a public questioning of the value of a key global health institution should encourage WHO and other such organizations to take these challenges seriously. That is not to say that the Trump administration was right, but it does show that the consensus that undergirded global health governance for all of these years is more fragile than we may have assumed. One of the problems that has befallen WHO and other global health governance institutions during the twenty-first century is that they have been too slow to adapt to contemporary realities. There have been accusations that their structures and financing models are out of date, reflecting the international political dynamics in the late 1940s instead of the current arrangements and the need for more holistic, coordinated responses to address global challenges that necessarily cross borders and require strategies that go beyond individual state interest. There have been a host of reviews and independent panels that have proposed reforms—but far too few of these reports have done anything except collect dust on the shelves. If WHO and other global health organizations cannot show some measure of responsiveness

to criticisms—and if no member-states are willing to take up the mantle to lead serious reform efforts—it is inevitable that we will see more challenges to the legitimacy of multilateralism in the global health realm.

DON'T OVERLOOK IPE

Not counting the introduction and conclusion, *Globalization and Health* consists of seven chapters. When I originally proposed the book, it had eight chapters. Over the course of the research and writing, though, I decided to scrap one of the chapters. It was not coming together very well, and I was finding it difficult to identify a compelling "in" that would engage the reader.

The subject of that chapter? The international political economy of health.

What drove my decision? Part of it was that I knew that I was not matching the clarity and insight of some of the best work already out there on the international political economy of global health (see, for example, Kay & Williams, 2009; Benton & Dionne, 2015; and Harman, 2015). Part of it was that the topic felt so broad that it was hard to know where I could offer something unique and insightful in the span of a single chapter in the book.

Most importantly, though, what I failed to properly appreciate was the scope and scale of institutional competition in global politics. I am, by nature, an institutionalist. Global health governance institutions clearly and certainly matter, but my focus on them led to a certain myopia that, in hindsight, exposes some of the problems with global health governance institutions. When we think about the major global health governance institutions, we (or at least I) tend to think of intergovernmental bodies like the WHO, nongovernmental organizations like Rotary International, public-private partnerships like Gavi, and philanthropic organizations like the Bill and Melinda Gates Foundation. These all matter and have played significant roles in shaping the conduct and course of global health politics.

What they have generally not done, though, is take up the cause of overhauling intellectual property rights and the broader international political economy of health. That is not to say that they have not championed the need for policy to pay attention to the social determinants of health, but they are rarely challenging the status quo of contemporary international political economy. This is a problem—not just because it allows inequities to continue, but also because it plays into the relative weakness of health-related organizations vis-à-vis economic-related organizations. The World Trade Organization (WTO), despite the challenges it has faced in the face of COVID (Narlikar, 2021), remains vastly stronger in global health than the WHO, has (relatively) serious enforcement mechanisms, and commands international attention that WHO simply does not. We do not see the powerful global health governance institutions being willing to upset the economic apple cart.

Indeed, when we look at the sorts of responses to global inequities highlighted by the COVID-19 pandemic, we see deliberate attempts to work within the existing

system. The COVID-19 Vaccines Global Access, better known as COVAX, was created in April 2020 as a partnership between WHO, the Center for Epidemic Preparedness Innovations (CEPI), and Gavi with a specific aim to "accelerate the development and manufacture of COVID-19 vaccines, and to guarantee fair and equitable access for every country in the world" (World Health Organization, n.d.). The underlying idea was that COVAX would funnel international resources to low- and middle-income countries to ensure access to COVID tests and vaccines. COVAX would serve as a massive vaccine purchaser and distributor, leveraging its collective buying power. Wealthy countries would provide the financing, and ninety-two low- and middle-income countries would receive vaccines through this purchasing mechanism. COVAX had received financial pledges from wealthy countries of more than $6 billion by the fall of 2021 and set a goal of distributing two billion vaccines by the end of 2021 (BBC News, 2021). This was essentially a program that sought to change the market calculus rather than change the market to provide more equitable vaccine distribution—a pragmatic response to the realities of the current state of the international pharmaceutical market. It also relied on a recognition of our collective vulnerability.

Unfortunately, COVAX's promises have not come to fruition. By mid-March 2022, COVAX had delivered 1.37 billion vaccines—a significant number, but a far cry from its initial ambition (Reuters, 2022). One of the biggest problems limiting COVAX's ability to purchase vaccines was a lack of cash. In early 2022, Gavi CEO Seth Berkley said that COVAX was "basically out of money" and started an urgent funding round to raise $5.2 billion (Associated Press, 2022). Of the 1.1 billion COVID vaccine doses pledged by the United States in 2021 for delivery by 2023 (not all of which were intended to go through COVAX), there were still more than 400 million doses yet to be shipped or delivered by May 2023 (Kaiser Family Foundation, 2023).

What explains these discrepancies? Many wealthy countries had pledged funds or vaccine doses to COVAX—but their magnanimous commitments ran into market logic. These states made large advance purchase commitments for their own citizens, which in turn drove up the prices of remaining vaccine stocks before COVAX could get set up. As a result, the actions of these wealthy states diminished COVAX's purchasing power and increased the prices COVAX would have to pay—and the delays in wealthy countries fulfilling their financial pledges hampered COVAX's ability to actually make purchases (Reardon, 2021). While this outcome may be frustrating, it is entirely consistent with existing international political economy rules.

This behavior was further exacerbated by donor states engaging in both vaccine nationalism and vaccine diplomacy. Vaccine nationalism "refers to the pursuit of vaccines in the national interest . . . through supply agreements or export bans, including where this might be to the detriment of other countries" (Vanderslott et al., 2021), but a pithier description would be that it is a "my country first" approach

to vaccines (Bollyky and Brown, 2020). Countries may have been willing to make pledges to an international effort to vaccinate the world, but they would only do so after hoarding enough vaccines for their own people. Rather than seeing COVID vaccines as a global public good, wealthy governments interpreted them as a zero-sum good, meaning that if one side gained something, another side necessarily had to lose. This mindset exacerbated the very problem that these governments were ostensibly trying to combat because it encouraged wealthy states to buy up as much vaccine as they could, leaving inadequate supplies for less-wealthy states—and leaving them vulnerable (Peacock, 2022). Vaccine diplomacy refers to the process of countries using vaccine doses as a tool to improve their relationships with recipient states. While Peter J. Hotez (2021) presents vaccine diplomacy as a tool to promote the common good, many analysts see it as more transactional. Yanzhong Huang (2021) comments on China's vaccine diplomacy efforts, "where Beijing's inoculations go, its influence will follow." This sort of behavior is not unique to China; Samantha Kiernan, Serena Tohme, and Gayeong Song (2021) note that the United States, Germany, France, and other leading donor states have earmarked a significant portion of their vaccine dose donations to "be distributed in a manner that cements donors' traditional spheres of influence" rather than being based on need and global equity.

Both vaccine nationalism and vaccine diplomacy can thwart many of the aims of global health governance, but they are consistent with the current rules of the international political economy. Antoine De Bengy Puyvallee and Katerini Storeng (2022) show how these ideas conflict with each other, leading to a situation in which COVAX's "impact was undermined by donors' and industry's pursuit of national security, diplomatic, and commercial interests, which COVAX largely accommodated."

It is beyond the scope of this chapter to provide a comprehensive evaluation of the shortcomings of COVAX or an overview of the rules of the international political economy when it comes to pharmaceuticals, but this short digression illustrates that we cannot—and should not—try to separate international political economy from global health governance. When health and trade come into conflict with each other, health generally loses. The global trade governance system has more teeth, and organizations like the World Trade Organization have the power to levy penalties that can have direct effects on states. The global health governance system, by contrast, relies predominantly on normative consensus and naming-and-shaming to encourage compliance. This is not to say that norms are not powerful in global health, as most countries comply with global health rules in most instances (Ruger, 2012). The fact remains, though, that there are multiple and competing subsystems of global governance, and states have decided to give greater power and authority to the economic systems than those governing health. Our systems prioritize those who can pay—and do so at our collective peril.

CONCLUSIONS, OR AT LEAST FINAL THOUGHTS

In September 2019, I had the opportunity to give a lecture as part of the launch of my book at my home institution. I could never have imagined that the issues that I was sharing with my audience about the nature of global health governance and the interplay between globalization and health would become front and center for the global community in a few months. One message that I tried to stress to the audience, and in the text of *Globalization and Health*, is that the ease of movement of people and goods across borders—the very hallmarks of globalization—may indeed increase the risk of disease outbreaks. At the same time, though, those very qualities that may heighten the risk we face also provide us with the tools that we can use to fight back against these outbreaks.

Despite everything that has happened over the past two years, I still believe that. At the same time, the COVID pandemic should be a catalyst to push us to continue to explore the interplay between globalization and health and better prepare ourselves for the next outbreak. We know that we will see pandemics in the future; we just do not know when they will happen, where they will start, and what will cause them. This is why we need to be on guard and avoid the panic-neglect cycle that tends to characterize so much of the approach that policy makers tend to take toward global health (Yong, 2022). We may not be able to predict the future, but it behooves us to continue applying the lessons that we learn now to improve our ability to navigate the future.

Diseases do not respect borders, and the COVID-19 pandemic has provided stark reminders about the need for countries to look beyond their own myopic sovereign self-interest to take a more collaborative approach. In many ways, this is the same lesson we have learned on a whole host of other issues, like addressing climate change, protecting the oceans, and combatting pollution. At the same time, though, the intersection of globalization and health brought forth by the COVID-19 pandemic demonstrates the need for holistic policies that center the social determinants of health (including gender) in international politics, the importance of designing institutions that can incentivize the cooperative approaches that are necessary to adequately address the challenges, and the vital need to recognize the interconnectedness of political and economic policies. Rather than seeing this as a conflict between widespread collectivism versus strict notions of Westphalian sovereignty, COVID-19 shows us the need to build policies, institutions, and diplomatic venues that can appreciate local concerns and needs while keeping our shared global needs in mind. Globalization may heighten our risk of pandemics, as the increased flow of people and goods across borders with ever increasing speed makes it easier for microbes to spread, but globalization can also provide us with the tools and information necessary to respond in a timely manner.

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8

Global Virtual Migration and Transnational Online Educational Platforms

Le Lin

ABSTRACT
In our digital age, virtual migration—workers providing transnational services without the physical mobility of workers' bodies—has become an essential component of globalization. This chapter draws on transnational online educational platforms connecting contractors in North America with young English learners in China, especially ABCKID (pseudonym), to explore how virtual migrants from developed countries provide services to customers in developing countries. Using in-depth interviews, surveys, and online data, I illustrate how ABCKID has mobilized highly mobile and highly immobile social groups that were previously marginalized by various labor markets—military wives, digital nomads, and stay-at-home moms in the United States and Canada—to join the platform, and thus expand the pool of virtual migrants. The alignment between these virtual migrants' motivations to overcome labor-market constraints and the characteristics of ABCKID jobs has not only prompted them to join the platform but also brought them immense job satisfaction. Although this platform dislocates contractors from their local contexts, contractors from these social groups have found meaning in their jobs. I discuss how mobilizing these formerly marginalized social groups into virtual migrants has facilitated the transition of globalization forms, while clouding and justifying the control and surveillance of digital globalization. I also discuss the impact of this transition on the direction of globalization and global inequality.

KEYWORDS
digital globalization, disembodied globalization, global inequality, physical mobility, transnational platform, virtual migration

How individuals conduct work on a global scale is an essential question in studies of globalization. It is also a window through which we can observe the past, present, and future of globalization. According to Baldwin (2016, 2019), one way to understand the historical evolution of globalization is to trace how the ways in which workers utilize global labor markets have gradually transitioned from physical cross-border mobility to telemigration—using the Internet and other means of telecommunications to provide services to markets and customers in other countries. Telemigration is also known as virtual migration or teleworking (Aneesh, 2006; Delbridge & Sallaz, 2015). In this chapter, I use virtual migration to explicate the broad category of workers providing transnational work without the physical mobility of workers' bodies.

To date, most studies on virtual migration have focused on how workers in developing countries provide services to customers and markets that are based in developed countries (Aneesh, 2006; Delbridge & Sallaz, 2015; Baldwin, 2019; Sallaz, 2019). We know less about the alternative direction—whether and how workers from developed countries provide services to customers in developing countries through virtual migration.

This chapter draws on transnational online educational platforms, especially market leader ABCKID, to demonstrate this alternative direction.[1] Like its competitors, ABCKID's headquarters is in China, and it has been mobilizing American and Canadian citizens to teach young Chinese students English online. Since individuals working on digital platforms are often known as independent contractors and the primary role of ABCKID contractors is to teach, this chapter uses the words *contractors* and *teachers* interchangeably when discussing individuals working on ABCKID. Given the nature of the job on ABCKID, these contractors and teachers are virtual migrants. To the extent that ABCKID's six major competitors (7-Speak-Up, Tada English, MagiKid, Wonder Fun, Mango Lingo, ELIKid; all are pseudonyms) adopt a similar business model as ABCKID's and interact with their contractors in a similar fashion (Lin, 2021), understanding ABCKID and its contractors sheds light on the operation of all these transnational educational platforms and the work of their contractors.

In the late 2010s, ABCKID was one of the world's largest online transnational educational platforms. Even in 2019, a prepandemic year when worldwide online education was less developed than it is today, ABCKID connected over one hundred thousand North American teachers with over seven hundred thousand Chinese students (Business Wire, 2019). There are, of course, deep-rooted macro social changes that have prompted so many North American teachers to provide educational services to Chinese learners through virtual migration. One of these changes lies in the rise of China's middle-class families since Deng Xiaoping's reform and the decline of their counterparts in the United States due to soaring debts, stagnating wages, and rising costs of living.

To find out more about how individual contractors' participation has unfolded against this macro backdrop, this chapter explores the interaction between meso-level organizational characteristics and micro-level individual motivations and job satisfaction rates. Using interviews and surveys with 37 ABCKID teachers and online data,[2] I unpack how ABCKID's organizational characteristics have helped new social groups to overcome their labor-market constraints, thus mobilizing them to join the platform and expanding the pool of virtual migrants. Knowing these meso- and micro-level dynamics, in return, illuminates on the macro-level direction of virtual migration and related global inequality. Capturing these dynamics also sheds new light into the role of digital globalization in steering the direction of globalization—are the growing virtual connections on a global scale and the decline of physical ones leading us to "deglobalization," the end of globalization as we know it, or simply "reglobalization," the rise of a different form of globalization?

After introducing the platform and the basic profiles of its contractors, I illustrate how highly mobile and highly immobile social groups from the United States and Canada (e.g., global travelers, military wives, digital nomads, and stay-at-home moms) previously faced constraints in, or were denied access to, various local and global labor markets. I call these people socially marginalized groups, given these job-market constraints and barriers. As a transnational and virtual platform with flexible and portable jobs, ABCKID has been particularly appealing to these social groups, and has helped them overcome labor-market constraints. Such an alignment between ABCKID's organizational characteristics and contractors' motivations has facilitated the participation of these social groups and elevated their job satisfaction. Although this platform dislocates contractors from their local contexts, contractors from these social groups find meaning in their jobs and accept the platform's controls. At the end of this chapter, I discuss my findings' broader implications for understanding the direction of globalization and global inequality.

THE PLATFORM AND ITS CONTRACTORS

Let me first introduce the platform and its contractors. ABCKID was one of the world's largest online teaching platforms in the late 2010s, and one of the most sought-after education technology companies among global investors (Business Wire, 2018). Moreover, ABCKID is a platform in the sense that teachers indicate time slots in which they are available, while students and their parents book these slots with the teachers. ABCKID is also transnational: its headquarters is in Beijing, China; its teachers, predominantly U.S. and Canadian citizens, live all over the world and remotely teach students who live in China. ABCKID does not require teachers to work at a designated time or in a designated space. Rather, it

uses camera monitoring, customer ratings, and the involvement of students' parents to supervise a spatially dispersed workforce.

Regarding the basic profiles of workers, the analysis of my survey of the 37 ABCKID teachers provides a clue. The average age of these 37 teachers is 31.5. Twenty-nine of them are female. As for race, 32 are white and the rest include 1 African American, 2 Hispanics, 1 Asian-white, and 1 Hispanic-white. This is a highly educated group: 4 hold PhD/JD degrees, 18 hold master's degrees, and the rest have bachelor's degrees. Regarding citizenship, 36 are American and 1 is Canadian. This is to be expected, as ABCKID demands that its teachers be native speakers with North American accents.

With interest in worker mobility, I also analyzed the locations of the 37 teachers. When they had started their ABCKID jobs, 11 of the teachers had been studying, working, or traveling outside of their home countries of the United States or Canada. When the interviews were conducted in late 2018 and early 2019, 9 of the teachers were still living outside of their home countries. The host countries and regions where my informants had lived include three European countries (Germany, Sweden, and Croatia), five Asian countries and regions (South Korea, Japan, Thailand, Hong Kong, and Taiwan), as well as Mexico and Ecuador. It is notable that none of my informants were living in Mainland China during the interview.

TWO SOCIAL GROUPS AND THEIR LABOR-MARKET CONSTRAINTS

Closer scrutiny of the teachers in the sample reveals two socially marginalized groups who face substantial constraints in domestic and global labor markets. The first group includes highly mobile virtual migrants, encompassing the 11 U.S. citizens studying, working, or traveling overseas and the 3 military wives. Of those who have been traveling in Europe and Asia, 2 are digital nomads who use telecommunication and other technologies to earn a living while traveling constantly. The 3 military wives also must move frequently with their husbands within the United States or among U.S. military bases overseas. The second social group includes highly immobile individuals, with stay-at-home moms being the prototypical examples. There are 3 stay-at-home moms in my sample. They not only rarely travel, but also rarely work outside the home in their local communities.

Indeed, some workers in the highly mobile group are more mobile than others. For example, digital nomads usually travel more frequently than military wives, who in turn and on average may be more mobile than other U.S. citizens studying in a foreign country. As I will elaborate upon, however, all of these workers face similar constraints in both local and national labor markets. Therefore, I include all of them in the highly mobile group.

Partly because they are highly mobile or highly immobile, these socially marginalized individuals face constraints in either local offline labor markets or locally serving online platform markets (e.g., jobs at Uber or DoorDash), or global online

labor markets that are based on rigid schedules (e.g., call centers). Some of them even face constraints in multiple labor markets. For example, digital nomads and military wives usually encounter restrictions in seeking stable jobs in local offline labor markets. Even if they can access locally serving online platform jobs, their high mobility prevents them from working these jobs on a long-term basis.

High mobility also puts military wives and digital nomads in a situation where they are susceptible to various penalties for moving. Clara, a 27-year-old military wife and a former high school teacher, provided details about how job-market constraints, when combined with demotions as penalties in the brick-and-mortar public school system, pushed her out of the system:[3]

> My husband is in the military, so we move quite frequently. Very very frequently . . . We just moved here a month ago. We are moving again, probably in five or six months. So getting a public school job for one semester? I would feel very dishonest if I promised to be there for a year. No one is going to hire me for five or six months. No one. We have no idea where we will be going in five or six months . . .
>
> I have changed jobs, changed [school] districts. I taught two years in two different districts. It was a mess. We lived in three different places in Texas. And in Texas, every time you switch districts, they move you back to first-year teacher. So that sucks. (Informant no. 8)

Even for U.S. and Canadian citizens who travel to other countries to study or work, they often face institutional barriers in their host countries, such as visa regulations restricting noncitizens' work opportunities. For example, Bella is a 27-year-old white female teacher who is a U.S. citizen. She had been living in Sweden at the time of the interview. She describes how she initially suffered from a visa-related job-market constraint after losing her previous job in Sweden, and how this situation eventually prompted her to explore a virtual job opportunity with ABCKID:

> I was living in Sweden at the time, and I lost the job that I had in Sweden. The visa regulations, as they were, I could not do any other work. I was only allowed to do the work I had been doing. So until I had the actual correct registration, I couldn't technically apply for any jobs in Sweden. So when I lost that job, I had to look for options of remote work that I could do as a U.S. citizen but not living in the U.S. So basically I did lots of research on online jobs . . . (Informant no. 3)

In some cases, individuals initiated global travels only because they had been trying to change career paths, but had faced barriers in doing so, in both their original regions and other regions within the same country. For example, Kristin is a 37-year-old female teacher, and she became a frequent global traveler when she failed to change careers domestically:

> I started teaching in 2014 in Taiwan at a language school. Then I moved to Myanmar in 2015. Then in 2016 I moved to China. From 2017 to 2018 in Poland. And 2018 to 2019 in Japan. I majored in drama and communications, which I loved. I lived in San Francisco for five years, doing all sorts of things. Before I moved abroad, I was a

> special event coordinator for a nonprofit. I mean, it couldn't be more different from what I did later. But I had reached a point where the next step up was fund-raising. And I am really bad at asking people for money. Just found it really uncomfortable. It's funny, because I was looking into, like, jobs in other states. Just kind-of needed a change. But it was easier to move halfway across the world than move to a different state. It's really funny. Unless you are there, people won't look at your application if you are not in the state. (Informant no. 22)

For global travelers, digital nomads and military wives, their high mobility is also associated with many transitional periods and situations: constant need to settle down in a new place, transitioning into a new role and acclimating to a new environment. These situations complicate the process of accessing various labor markets.

As for highly immobile groups, especially stay-at-home moms, spending a large proportion of their time caring for children at home means that they face difficulties in accessing local offline jobs, as well as online jobs that are based on rigid schedules. Although stay-at-home moms can work on locally serving platforms (e.g., Uber and DoorDash) that allow flexible schedules, the fact that they are women and that these jobs require face-to-face interactions with customers often breeds hesitation among these mothers.

For stay-at-home moms in certain areas, local culture provides an additional layer of constraint. For example, in Utah many mothers cannot go outside their homes to look for jobs because the local culture influenced by Mormonism compels them to stay home. Judy, a 30-year-old stay-at-home mom in Utah, reveals the pressure in her neighborhood as follows:

> Out of the people that I know who are doing this [ABCKID], they are all stay-at-home moms. Where I live, pretty much all the moms are stay-at-home moms. That's the kind of culture where I live. It's what it's like . . . I mean, it is fulfilling and rewarding, but sometimes it's not . . . it's monotonous. (Informant no. 17)

In sum, labor markets are not very friendly toward individuals on the two tails of the mobility spectrum: those who are highly mobile or highly immobile face various constraints in accessing labor markets, although the levels and types of constraints for each group vary. For certain individuals in these groups, such as stay-at-home moms, labor-market constraints can be so overwhelming that these individuals are denied access to all labor markets.

TURNING TO VIRTUAL MIGRATION

This section will illustrate how socially marginalized individuals, especially those in the highly mobile and highly immobile groups, have become ABCKID contractors. I highlight how ABCKID's organizational characteristics are appealing to these two groups. Their participation in the transnational platform job expanded the pool of virtual migrants.

As a new type of virtual, home-based, and transnational platform (Lin, 2021), ABCKID generates jobs that are known for their relatively competitive income, schedule flexibility, and portability. ABCKID provides a relatively competitive income and stable bookings. It pays an hourly wage that ranges from $14 to $22, and the average hourly pay among teachers in my sample was about $20. There is consensus among my informants that this pay is higher than most other platform jobs they have worked, such as being transcriptionists for hire or freelance clothing stylists (informants no. 8, no. 14, no. 23). According to Grace, a 36-year-old stay-at-home mom who lives in Pennsylvania and has worked multiple platform jobs, "for any other jobs, any other legitimate work-from-home jobs at the entry level, their hourly pay isn't even close [to that of ABCKID]" (informant no. 14). Moreover, ABCKID provides more stable bookings than many other platforms, ensuring the predictability of work hours.

The relatively competitive income and stable booking are appealing even though many contractors are merely interested in using this job for supplemental income. Table 8.1 reports my interviewees' motivations for embarking on their platform jobs, and I conducted a frequency analysis of each motivation mentioned. Of course, many joined ABCKID for multiple reasons, and 33 teachers cited multiple motivators. As table 8.1 shows, earning a little extra income is the motivation most frequently discussed by my informants. Twenty-five informants mentioned that making extra income was one of the major motivators for working on ABCKID.

Competitive compensation, when combined with flexible work hours and portability of the work, makes the job even more broadly appealing. Like other platform jobs such as driving Uber, working on ABCKID is based on flexible schedules. Contractors can decide when to start and when to stop working. Moreover, contractors only need a computer or an iPad to complete all their work on ABCKID. This means that the job is completely virtual and portable: contractors can conduct the work at home, or they can bring the work with them to wherever there is an Internet connection.

This combination of organizational characteristics is especially appealing to the highly mobile and highly immobile groups. For military wives and stay-at-home moms whose husbands usually shoulder primary financial responsibilities, what women often seek from jobs is not "bring home the bacon," but instead a little extra income and something to work on. The flexibility of the ABCKID job is especially appealing to the highly mobile who need to travel frequently, and the highly immobile who spend much of their time caring for family members at home. The job's portability further ensures that contractors on this platform are freed from face-to-face interactions with customers. Therefore, contractors, and especially female contractors, do not have to worry about their safety at work.

More importantly, this combination of organizational characteristics allows the highly mobile group to overcome labor-market constraints. As shown in table 8.1, 18 informants mentioned that one important reason they chose to work

TABLE 8.1 Job Motivations, Their Frequencies, and Representative Quotes among ABCKID Teachers

Motivator	Frequency	Representative Quotes
Making extra money	25	"I need a little extra money." (Multiple informants) "I am a teacher, so I do not make much money. I was thinking about what to do for summer work, something flexible so I can still travel with my daughter." (Informant no. 20)
Overcoming labor market constraints	18	"I lost the job that I had in Sweden. The visa regulations, as they were, I could not do any other work." (Informant no. 3) "My husband got a job at the University of Cape Town. We moved here . . . There are some limitations on my visa in terms of what kind of work I could do. We also need U.S. dollars at that time." (Informant no. 12) "My husband is in the military, so we move quite frequently . . . So getting a public school job for one semester? I would feel very dishonest if I promised to be there for a year. No one is going to hire me for five or six months. No one." (Informant no. 8) "I couldn't stand being away, you know, work for ten hours a day, missing everything, missing her growing up, basically. That's why I have been looking for something remote for so long and I haven't been able to find anything. So it's definitely a motivator [for a stay-at-home mom to work for ABCKID]." (Informant no. 14)
Going through transitional periods and situations	17	"When I started I had just returned from Taiwan. I was actually looking at a few different companies . . . I lived in Denver Colorado, but I was auditioning for a dance company in Indianapolis. So I need something movable to both places." (Informant no. 28) "I just came back from Thailand and I needed something to do while settling down." (Informant no. 23) "I was in graduate school right before that. I was in physical therapy school, and I did that for a couple of semesters. I just kind of had this point where I was like, this isn't what I wanna do with my life, so I took a break from that and I was looking for a job or something to do while I figured stuff out." (Informant no. 1)
Fitting background, interest and specialty	10	"I really enjoy teaching. I taught ESL briefly, just a few weeks on a trip to China. I enjoyed it." (Informant no. 34) "I used to teach English in Taiwan so I wanted to use my previous experience." (Informant no. 28) "I am a full-time teacher with a master's degree in ESL." (Informant no. 21)
Giving it a try	5	"I was like, this is worth trying. If it works out, that is great. If it doesn't, that is fine too." (Informant no. 26) "There wasn't much to lose." (Informant no. 5) "I went back and forth for a while with it because of my time zone, I didn't know if I could get through it. And I decided, you know, if I hate it, I can just find something else to do. It was worth trying. Now this is my main source of income." (Informant no. 34)

on ABCKID was because the platform helped overcome constraints imposed by host countries for noncitizens, such as visa regulations. This makes overcoming labor-market constraints the second most frequently mentioned motivation.

For military wives who travel frequently, either globally or domestically, working on ABCKID means tackling labor-market constraints head-on. For example, Rebecca is a 33-year-old female teacher and a military wife. She discussed how the job on ABCKID helped her solve unemployment issues associated with frequent moves and how the positive experience inspired her to keep this job as a lifelong career:

> One of the big things for me is the portability of this career, because my husband is in the military. He was enlisted about eight years ago. He will be a career military. So every time we moved in the past, even though I was on federal employment, because it was bureaucratic and slow, I've always had a period of unemployment for at least a couple of months. Sometimes up to six months. We moved to Germany, and then moving back from Germany to Texas—those are huge moves. I mean, I was like, not working for six months. I don't like not working. I am not happy, just at home, not doing anything. So I think I will stay with ABCKID, not as a full-time thing ever. But always to be there, with the move especially. I know we've got another move coming up in November probably. I don't know where we are moving, or anything like that. (Informant no. 31)

Table 8.1 also points out that the third most frequently mentioned motivator is using the current job to smoothen transitional periods and situations. While some people were motivated to use this job while trying to settle down domestically after global travels, others were using this job because they were trying to figure out their future career paths. As I mentioned previously, many of these transitional periods are associated with frequent moves. Therefore, many of those who mentioned this motivator were highly mobile individuals, such as global travelers and military wives.

As for the highly immobile group, especially the stay-at-home moms, many were kept out of the labor market due to multiple constraints. The possibilities of overcoming these constraints and fulfilling both home and work duties have become a major consideration when evaluating a new job. Grace, the stay-at-home mom of a two-year-old girl mentioned earlier, said:

> I couldn't stand being away, you know, work for ten hours a day, missing everything, missing her growing up, basically. That's why I have been looking for something remote for so long and I haven't been able to find anything. So it's definitely a motivator. (Informant no. 14)

By mobilizing social groups that had previously faced difficulties in labor markets, ABCKID has expanded the pool of virtual migrants. Since ABCKID's organizational characteristics are especially helpful for overcoming the labor-market constraints for the highly mobile and highly social groups, this job became known as ideal for these social groups.

My examination of reviews of this job by contractors on Glassdoor confirms this: when contractors were asked to list the "pros" and "cons" of the job, the most frequently mentioned "pro" for working with ABCKID, appearing in 254 of the 1,164 reviews, was "work from home or while traveling." In fact, this job is so traveler-friendly that it is, according to an ABCKID teacher, "attracting people who shouldn't be teachers" and who "teach in airport bathrooms" (informant no. 26). Another "pro" that appeared in 32 reviews on Glassdoor was, "this was a great job for stay-at-home moms." When these individuals who are on the two tails of the mobility spectrum joined ABCKID en masse, the pool of virtual migrants ballooned.

VIRTUAL MIGRANTS' WORK EXPERIENCE AND JOB SATISFACTION

ABCKID has helped highly mobile and highly immobile groups overcome job-market constraints, and the job has also enabled virtual migrants to earn extra money on a flexible schedule. Therefore, most teachers, especially those from the highly mobile and highly immobile groups, report high satisfaction with this job. Below, I first document how ABCKID organizes teaching and controls teachers. It is with this backdrop in mind that teachers' high satisfaction rate is puzzling.

ABCKID is known for two seemingly contradictory approaches to teacher management and evaluation: its hands-off model and micromanagement. On the one hand, ABCKID enforces teacher management by encouraging parents to participate in class and to evaluate teachers. This hands-off model, which is dependent on customer evaluation, is similar across the entire platform economy sector.

On the other hand, ABCKID engages in micromanagement by intervening in what and how to teach. ABCKID offers teachers centrally prepared educational content. The platform adopts an American Common Core–based curriculum and prepares a standardized course structure for teachers. ABCKID also provides course slides to teachers and demands that teachers use these slides. It even attempts to standardize how teachers teach. For example, teachers are required to give students various forms of virtual rewards and use props (e.g., toys) as often as possible. Many teachers welcomed this centrally prepared model, primarily because it reduced their course preparation time. In addition, ABCKID prohibits its teachers from being seen yawning, sipping coffee, or resting their knees over their desks. Furthermore, the platform is strict on class cancellations and teacher no-shows. Teachers need to show hospitalization records or death certificates of immediate family members to cancel classes without jeopardizing their contracts. Even if they can present this proof, they still often face fines.

Despite the platform's micromanagement and strict rules, most ABCKID teachers I interviewed were satisfied with their work arrangements, and even found their work on ABCKID meaningful. In the survey, I asked each informant to evaluate their job satisfaction on a scale of 1–5, with 5 being extremely satisfied.

TABLE 8.2 Average Job Satisfactions across Groups

	Number of Informants	Average Job Satisfaction Score (1 = extremely unsatisfied and 5 = extremely satisfied)
The Highly Mobile and Highly Immobile Groups	17	4.59[a]
Others	19	4.11[a]

NOTE: There are only 36 respondents because there is one respondent with missing data.
[a] The t-Test shows that the means for the two groups are significantly different ($p < 0.05$).

The 36 respondents' average satisfaction rate was 4.33. This high job satisfaction rating in my sample is consistent with evaluations of ABCKID in media reports and on job review sites. For example, *Forbes* ranked ABCKID the No. 1 "work-from-home" job in 2017 and No. 3 in 2018. In comparison, Amazon Mechanical Turk was ranked No. 3 in 2017 and No. 7 in 2018 on the same list. In 2020, predominantly positive reviews by teachers helped ABCKID rank in the Top 10 on Glassdoor's Best Places to Work in the U.S. (Business Wire, 2019).

Contractors are highly satisfied working with ABCKID not only because of its competitive pay, flexible schedule, and portability, but also because these organizational characteristics are particularly welcomed by the highly mobile and highly immobile groups. As table 8.2 shows, the 19 contractors who are in neither the highly mobile nor the highly immobile group show a mean job satisfaction rate of 4.11. Most contractors in this group are schoolteachers, graduate students, or legal staff who do not earn a high salary from their full-time jobs.

In comparison, the 17 contractors in the highly mobile and highly immobile groups are more satisfied. The average job satisfaction rating for these 17 contractors is 4.59, higher than that of the other 19 teachers. The difference in average job satisfaction rating between the 17 and the 19 teachers is statistically significant ($p < 0.05$). Of course, it is reasonable to inquire whether the test results are valid given the small sample size, and caution is needed when drawing general conclusions to the population level. Having said that, the fact that the t-test accounts for sample size and that the results are statistically significant despite the small sample has at least one implication: the mean job satisfaction rate of the 17 informants is indeed much higher than that of the other 19. In fact, the high rating of the 17 teachers boosts the overall job satisfaction in my sample.

One of the major reasons these 17 teachers were highly satisfied is because being virtual migrants on ABCKID has empowered them to overcome labor-market constraints. They are now not only able to have a job that seemed impossible in the past but also able to reconcile the conflicting obligations between remaining employed and caring for their families. Clara, the military wife mentioned earlier, called her experience with ABCKID "perfect" because she had been able to "move and still have my job" (informant no. 8). After working on ABCKID,

she also increased her visits to her extended family members in other U.S. cities because "the entire classroom can fit in the suitcase." Being virtual migrants overseas also means not having to wake up early in the morning to teach, as many contractors in the United States do. I will elaborate on this in the following section. Moreover, stay-at-home moms' experience was largely positive because teaching on ABCKID allowed them to join the workforce without forsaking their childcare responsibilities.

For stay-at-home moms, another source of satisfaction entails spending less time, money, and resources on commutes and therefore greater dedication to childcare. Some informants were willing to sacrifice their previous higher-paying jobs for less commute time. As mentioned previously, Grace is a 36-year-old stay-at-home mom living in Pennsylvania. She used to work in a bank but quit after her daughter was born. She elaborated on why she gave up the bank job even though its pay was higher than that of ABCKID:

> I think people average about 20 dollars an hour with ABCKID. It was definitely less than what I made at the bank. But [you also have to consider] the no-commute, staying-at-home, making your own hours. The only downside is the health insurance. I have to pay my own health insurance. But everything else is just like I am fine making less money as long as I can stay home. (Informant no. 14)

The second major reason for the high satisfaction rate lies in the fact that the flexible employment arrangement under ABCKID has added color to lives and reduced monotony. These factors are also most helpful for stay-at-home moms and military wives who used to lack social lives. Judy and Madeline, who are stay-at-home moms, indicated that the job gave them "something refreshing" in the morning and "something else to break up the day" (informants no. 17, no. 29). Madeline added that working on ABCKID made it more enjoyable to take care of her daughter (informant no. 29).

The third reason behind the observed high level of job satisfaction is because being virtual migrants on ABCKID enabled some teachers to realize their dreams. For example, the two digital nomads in my sample said they had always wanted to travel while financially supporting themselves. Yet they could not possibly have led such a life had they worked within traditional work arrangements. They had chosen to travel across the world when they realized they could bring the ABCKID job with them anywhere they could use wi-fi.

Brian, a 27-year-old male teacher currently traveling across Europe, is one of them. He explained that he was first stuck between a job he disliked and unemployment after graduating from a liberal arts college with student loans. He decided to become a digital nomad traveling across Europe:

> I was in Corporate America [before joining ABCKID] and it was a terrible organization. [It was in the] banking, mortgage industry. Terrible . . . So I really, I did not have another plan. But it wasn't on desperation either, because the saving was carrying

> me through it while being unemployed. I was just trying to figure out the next step because of my age. I am 27. Last year I was 25 going on to 26. My age group cohort, like we are all burdened by student loan debt. We can't finance houses because Gen-Xers can outbid us with capital we don't have. And it's like, all of my friends are in Corporate America or they are in jobs that are not satisfactory. This particular job [at ABCKID] enables me to travel. (Informant no. 4)

DISLOCATED FROM LOCAL CONTEXTS AND MEANING FOR VIRTUAL MIGRANTS

Although ABCKID contractors still have local lives and ABCKID has been helpful in overcoming various labor-market constraints, the platform dislocates its contractors from their local contexts. Various forms of dislocation are micro-level manifestations of the transition from embodied to digital disembodied globalization (Steger & James, 2020). According to the two scholars, embodied globalization is characterized as the physical mobility of human bodies, while disembodied globalization entails the digitally mediated exchange of ideas, information, and data. This transition, according to them, has been not only chaotic but also contradictory: on the one hand, the rise of disembodied globalization provides workers with greater job flexibility, higher job satisfaction, and sometimes even more access to jobs; on the other hand, the shift toward disembodied globalization is often associated with workers' detachment and disorientation from the tangible embeddedness in the local social world. Below I highlight three ways in which various forms of dislocation transpire on ABCKID.

First, ABCKID contractors are dislocated from their local times. ABCKID contractors are required to work around their students' schedules. Because Chinese students usually utilize this supplemental education service in after-school hours such as evenings, ABCKID teachers living in North America greet their students with "good evening" during these teachers' early morning hours. Typical work hours for teachers who live on the East Coast are from 6–8 a.m. Those who live on the West Coast face more challenging hours since they need to teach from 3:00 a.m. to 5:00 a.m. Teachers based in Asia and Europe enjoy more comfortable working hours in the afternoons and evenings. Bella, the Sweden-based teacher cited earlier, even said that she would not have considered ABCKID had she still been living in the United States (informant no. 3).

Since the platform job schedules are flexible, ABCKID contractors can be more dislocated from their local times than those working on other types of virtual migration work with a 9–5 schedule. On the one hand, this work schedule flexibility prevents teachers from being forced to work long hours, especially in early mornings. Teachers can also adjust their schedules to fit their needs. On the other hand, work schedule flexibility allows some teachers to self-impose demanding work hours with little supervision or organizational support. Some teachers even

have to pull all-nighters during summer and winter vacations when Chinese students have extra learning time at home. Mia, a 25-year-old female teacher living in the Midwest, spent the summer of 2018 working from 8 p.m. to 8 a.m., seven days a week. She said:

> When I was doing the overnight, it felt like my days are longer than 24 hours, because, I mean, I would work 12 hours and I wouldn't want to sleep all during the day because I wanted to feel that I had a life. So I was sleeping very minimally during the day, then staying up all night long and trying to be awake. I mean, it was awful. Awful. (Informant no. 26)

Second, ABCKID dislocates contractors from their local legal environments. We have seen how the ABCKID job has allowed some teachers to overcome visa constraints associated with living outside the United States while teaching students in China. On the other hand, it is not uncommon for ABCKID teachers to be stuck between legal and policy differences among multiple countries, including the home country, the host country where they live, and China, where ABCKID is based. Even if the legal and policy differences are only between two countries, ABCKID teachers still must navigate through the gaps.

Dustin, a 30-year-old male teacher living in the United States, recalls such a situation: the Chinese government had pressured ABCKID to demand that all teachers obtain teaching certificates and wear an orange-colored uniform in order to demonstrate professionalism, but labor laws in the United States prevent contractors from being forced to wear uniforms. According to Dustin, ABCKID teachers vented their grievances to ABCKID and eventually "ABCKID had to change it because we are independent contractors so I guess they cannot require us to wear something specific" (informant no. 11).

The third way in which dislocation operates lies in the disconnect between ABCKID contractors and their local sociocultural environments. Unlike traditional international migrants who usually work for organizations in the host countries, virtual migrants work largely by themselves in a more complex sociocultural environment. What makes jobs on these transnational platforms challenging is that these platforms provide no on-site supervision, formal training, or organizational support. Contractors must navigate cross-cultural adjustment on their own. For example, contractors often find themselves stuck in divergent discourses regarding social and political issues in China. This has been especially true in recent years, as both China and the United States have witnessed growing nationalism.

Although many informants of mine were dislocated from local contexts and faced stringent controls from the platform, quite a few of them considered this job meaningful. I asked my informants if they considered teaching on ABCKID a meaningful job. Eighteen informants said yes. Among them, many belong to the highly mobile and highly immobile groups. For them, teaching on ABCKID constituted an opportunity to experience transnational culture, especially helping

children of other countries to grow. Seven informants elaborated that they found it meaningful to help children grow, bond with young students, and push the limits of what students can discuss. Clara, the military wife mentioned earlier, recalled how she had found meaning in helping a young Chinese girl. She said:

> I have one student, this beautiful girl. When I first started with her, she was so quiet. Quiet as a little mouse . . . She was so nervous and so afraid of making mistakes. Every time she made mistakes, she said, "I am sorry teacher. I am sorry." I told her, "You are way smarter than everyone thinks you are." I told her, "You are good at speaking and you can do this." Once she got that, she leaped four levels . . . it is the pushing-forward that matters. (Informant no. 8)

What is important is not only helping children from another country, but also living a cross-cultural life, even if contractors are immobile. Several informants explicitly mentioned that teaching on ABCKID had helped them connect with a foreign culture. This is especially important for people who usually spend a vast amount of time in their local neighborhoods. For example, a 33-year-old mother said, "I do enjoy kind of the cultural outreach that's happening as a result. I do feel that I have a vested interest now in what happens in China" (informant no. 30).

Of course, these special groups, being highly satisfied with the job and finding it meaningful, might reflect a harsh reality: since these social groups are so marginalized in labor markets and are more likely to find meaning in child-related cross-culture work, they are also likely to tolerate the control and exploitation of the platform.

CONCLUSION AND DISCUSSION

In this chapter, I have investigated platform-induced virtual migration as an essential element of globalization. I have used ABCKID to show how this type of transnational educational platform mobilized new social groups that had previously been constrained by local and global labor markets, as well as how the alignment between the platform's organizational characteristics and contractors' motivations has facilitated contractors' participation while elevating their job satisfaction rates. By mobilizing new groups, and using global investment to boost market share, ABCKID has raced to the top among transnational educational platforms and the entire field of these platforms has thrived.[4]

My findings have important implications for understanding globalization's past, present, and future. On the one hand, globalization has indeed shifted away from the physical mobility of people. Traditionally, teaching a foreign language has been pertinent to international migration work because matching a student with a foreign teacher usually requires physical cross-country moves of at least one party. However, the rise of ABCKID and other virtual platforms has changed the dynamics. To the extent that the dominant form of teaching a foreign language

may have shifted to transnational online teaching, this chapter lends credence to Manfred B. Steger and Paul James's (2020) claim of a transition from embodied to disembodied globalization. My chapter also supports their claim on the chaotic and contradictory nature of this transition. Moreover, my findings provide further substantiation of the work experience of contractors under digital and disembodied globalization, especially their "unhappy consciousness"—an internally divided state of mind that values flexibility, greater satisfaction, and higher income, while at the same time suffering from new online surveillance measures and a general detachment from the tangible embeddedness in the local social world (Steger & James, 2020; Lin & Steger, 2022).

On a macro- and theoretical level, this chapter illuminates on the deglobalization versus reglobalization debate, as well as the nature of reglobalization (e.g., Bishop & Paine 2021; Benedikter, Gruber, & Kofler, 2022). My empirical findings on the rise of global online teaching suggest that we are not encountering an end of globalization but rather globalization in a different form. My findings on the growing consumption power of Chinese elites and middle-class families, as well as the expanding capacities of Chinese corporations in utilizing global capital and global labor, have also pointed to a major redirection of the reglobalization process. Moreover, this Internet-based reglobalization has empowered corporate managers to recruit formerly untapped social groups, while clouding the controls and surveillance over these social groups given these groups' fragmented work hours and locations.

Furthermore, the lives and job experience of ABCKID contractors call for rethinking world-systems theory and the related studies of global inequality (e.g., Arrighi & Drangel, 1986; Firebaugh, 2000; Wallerstein, 2011; Hung, 2016). On the one hand, my findings challenge world-systems theory in the sense that ABCKID reveals an alternative direction for connecting workers in core countries to customers in semiperipheral countries. On the other hand, my case and findings support and extend world-systems theory in two ways. First, the rise of ABCKID and other similar platforms could be attributable to the rise of China in the wake of the Deng Xiaoping reforms, allowing Chinese customers and corporations to purchase products and services from core countries.

Second, my findings have rich implications for the role of China in global inequality. Scholars generally agree that there has been a growing global inequality since the inception of the Industrial Revolution (e.g., Arrighi & Drangel, 1986; Firebaugh, 2000). It is worth investigating the direction in which the global inequality will move in the wake of China's market transition since the late 1970s. Hung (2016) illustrates a nuanced picture: on the one hand, the economic growth of this most populous country has greatly reduced the global inequality; on the other hand, China's successes in manufacturing and exports may have exacerbated global inequality by disrupting other developing countries' industrialization.

My findings point to a similar but slightly different direction. The rise of China may have alleviated global inequality by providing job opportunities to workers in

both developing countries and developed countries. This is especially true because I have shown the effect of China-based platforms on the income growth of previously socially marginalized social groups in North America. But the dislocation of these social groups' lives also reminds us of the pitfalls of only measuring inequality in terms of income: indeed, the financial well-being of these social groups has improved, but we should not neglect the psychological and social cost associated with the dislocation from the local lives, as well as the cost as a result of the heightened control and surveillance imposed by the platforms.

Last but not the least, the global inequality tends to persist since the name of the game under virtual migration still entails an unequal global division of labor and global exploitation. ABCKID simply presents a more nuanced picture: the unequal global division of labor does not cut a simple divide between core countries and semiperipheral countries, but rather between capital/labor from core countries and customers/managers from semiperipheral countries. This, again, attests to the nature of reglobalization as being a power reshuffle along multiple dimensions. Given the participation of previously socially marginalized social groups and their high level of tolerance for exploitation, this multidimensional reglobalization also tends to be less visible than before.

NOTES

1. ABCKID is a platform in the sense that teachers open time slots to students and their parents, and the latter book sessions with teachers. ABCKID does not require teachers to work in designated times or spaces. Rather, it uses camera monitoring, customer ratings, and the involvement of students' parents to supervise a spatially dispersed work force.

2. I recruited ABCKID teachers primarily through Reddit's ABCKID community, one of the largest ABCKID teacher forums. After I posted the project description and an interview advertisement on Reddit, 45 teachers contacted me. I selected 37 teachers who showed sufficient proof of employment (e.g., job ID, screenshots of the personal portal, etc.). Each interview was semistructured and lasted for about an hour. After the interviews, I sent survey questionnaires to these informants via email, and 36 informants responded. My survey questions focused on their demographic backgrounds, financial information, and job satisfaction. My online data included 1,164 reviews of ABCKID jobs on Glassdoor, a leading job review website. These were all the reviews about ABCKID I could find from January 2019.

3. To protect the identities of my informants, all their names used in this chapter are pseudonyms.

4. These achievements notwithstanding, the Chinese government imposed heavy restrictions on China's supplemental education industry in 2021. These new restrictions not only prohibit young children from taking supplemental lessons, but also forbid foreigners from teaching from outside of China. Consequently, the revenues of ABCKID and many other China-based educational platforms have been in a free fall since then.

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9

Corridorizing Regional Globalization

The Reach and Impact of the China-Centric Rail-Led Geoeconomic Pathways across Europe and Asia

Xiangming Chen

ABSTRACT
As globalization has partially retreated since the Great Recession of 2008–9, it has taken on an increasingly regionalizing form and force, with both integrating and fragmenting consequences. By advancing six large-scale economic corridors, China's Belt and Road Initiative has unleashed a round of regionalizing globalization by corridorizing local and translocal urban and economic development along large-scale China-driven transport projects. In this chapter, I first conceptualize economic corridorization as a new round of globalization from below that enriches and advances the discourse on globalization. Then I trace and explore the cross-border geoeconomic pathways shaped by China-driven, rail-led regional economic corridors, through the paired cases of the China-Europe Freight Train and the China-Laos Railway. The analysis focuses on how logistics and trade flows along these rail-enabled corridors foster new translocal economic ties, industrial restructuring, redistributes consumption power, and thus fosters regional globalization from the middle and below. The chapter concludes on how this type of corridorized regionalization reterritorializes the extant paths of globalization and creates new economic pathways of globalization.

KEYWORDS
Belt and Road Initiative, China-Europe freight train, China-Laos Railway, corridorization, regional globalization

Viewed through a short historical lens on the first twenty-plus years of the twenty-first century, globalization has taken three successive big blows with lingering impacts: the Global Financial Crisis of 2008, the nationalist-populist ideology

and protectionist policies of the Trump administration during 2017–21, and the COVID-19 global pandemic of 2020–22. In the face of these three setbacks to globalization, China came out of the global financial crisis less scathed than the West, absorbed much of the negative impact of Trump's trade tariffs and economic sanctions, and secured a faster economic recovery from the pandemic than the rest of the world. More importantly, through the Belt and Road Initiative (BRI), launched in 2013, China has been a powerful force pushing global trade and investment. Emanating from opposite sources, the West's partial stepping-back from globalization and China's stepping up to it have met and produced far-reaching global, regional, and local consequences.

Since its reform and opening in the late 1970s, China has steadily become a leading force for economic globalization from its considerably elevated position in the global economy. Registering at just 1 percent of the world's GDP and trade in the late 1970s, China brought both indicators to around 15 percent by 2020 (The Global Economy, n.d.; Nicita & Razo, 2021; Statista, n.d.). China accounted for about one-third of global economic growth over a full decade through 2019, larger than the combined share of global growth from the United States, Europe, and Japan (Rothman, 2021). Through the BRI, China has committed or disbursed around $600 billion in loans since 2013, compared to $490 billion by the entire group of multilateral development banks such as the World Bank (CISION PR Newswire, 2020). The BRI has also added a distinctive regional dimension to globalization through its six large-scale economic corridors and their score of subcorridors. This has introduced a new mode of "globalization from the middle" through the regional corridorization of new globalizing economic pathways that draw more countries and cities into their linked loops of infrastructure and urban development.

I start this chapter by tracing the intellectual lineage of earlier corridorized urbanization as a conceptual bridge to the new period of BRI-driven regional corridorization of globalization. I see the simultaneous upscaling of corridor-shaped regional economic dynamics toward the global scale and the downscaling of newly connected flows along the BRI corridors to translocal economic connectivity and development. Then, using the China-Europe Freight Train and the China-Laos Railway, I explore these rail-led economic pathways as the driver and facilitator of corridorizing regional globalization across China-Europe and China-Southeast Asia. In conclusion, I draw insights for better understanding corridorized globalization and its long-run cross-border regional and local consequences.

TOWARD CORRIDORIZING GLOBALIZATION

Globalization via corridorization is heavily and distinctively regional in formation and shape, with expected regional consequences and broader translocal spillovers. While regional development along an urban-economic corridor is not new, corridor-triggered globalization with large-scale cross-border regional and local dimensions is fairly recent, having come into view since the BRI. By promoting six

cross-border regional economic corridors stretching from deep inside China to neighboring and far-flung countries and cities (see figure 9.1A), including and via a number of subcorridors (not shown), the BRI has unfolded an era of globalization through regional corridorization as a new dimension to the existing geography of globalization. As this corridorizing globalization takes shape, it runs against the recent forces of deglobalization by activating latent conditions and forces spread along a given transport corridor in producing new opportunities and challenges for regional and local development within and across national boundaries. To the extent that corridorizing globalization is new or not, it calls for tracing its sources of reference.

The shape of corridorizing globalization is related to its local scale of urban corridors, whose origin can be traced to the emergence of metropolitan extensions beyond local administrative boundaries in advanced economies in the early 1960s, if not much earlier. One could even argue that the ancient Silk Road, which inspired the BRI, might be the world's first long trade corridor, even though it involved many barely connected paths or subcorridors (Hansen, 2015). Linearity via transport infrastructure is a defining feature of modern urban corridors, which can also involve two other axes—of urbanization and economic development—between two or more city-regions. Besides their generic linear structure, urban corridors take on such network attributes as poles at either end, nodes between two poles, and branches and intermediate points serving as spin-off lines and secondary hubs (Georg, Blaschke, & Taubenböck, 2016). These features bear both the vertical and horizontal network characteristics of spatially embedded regional infrastructure-led economic systems.

To draw further inference about corridorized globalization from urban corridors, the factors of scale, length, border, level of development, and the state are critically relevant. The sixty-seven global urban corridors identified by Isabel Georg et al. (2016) are typically between 400 and 1,200 km long, 70 to 200 km wide, and with a length-to-width ratio between four and ten (see figure 9.1B). They are generally shorter than the six BRI corridors, as the China-Pakistan Economic Corridor (no. 6 in figure 9.1A) runs over 3,000 km from Gwadar, Pakistan, to Kashgar, Xinjiang, although the BRI corridors' width is numerically vague due to a lack of clear measuring criteria. About 95 percent of those sixty-seven urban corridors begin and end within national territories, such as the classic case of the Boston-Washington (BosWash) corridor along the U.S. Northeastern Seaboard (no. 12 in figure 9.1B), while all six BRI corridors span multiple national borders and remote border cities. In addition, approximately 60 percent of the sixty-seven urban corridors are anchored to and pass through two or more major national and international centers and their well-integrated hinterlands in advanced economies, while the six BRI corridors cover a variety of less developed countries and cities with the latter's surrounding regions. Finally, most urban corridors are market-induced, with very limited formal national and subnational planning and relatively little inter-city coordination. The BRI corridors, however, are driven by

FIGURE 9.1A. The Six Belt and Road Regional Economic Corridors.
SOURCE: GISreportsonline.com; published with permission in X. Chen (2020): figure 1.1.

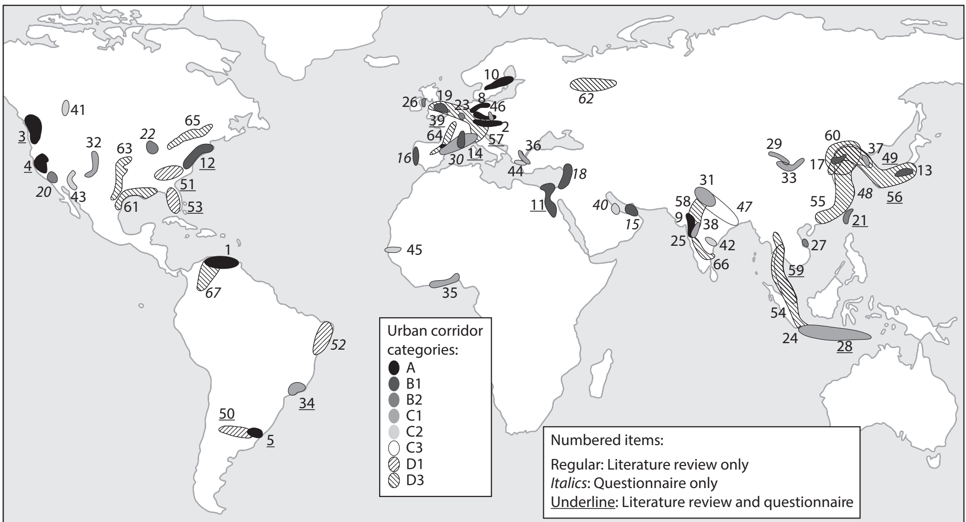

FIGURE 9.1B. A Global Inventory of 67 Urban Corridors. The categorical names of these 67 urban corridors were listed by these three authors in table 2 of their paper published in 2016. For example, no. 12 on the map is BosWash or the Boston-Washington corridor on the Eastern Seaboard of the United States. No. 59 refers to the Bangkok-Singapore corridor, which is much shorter than the China-Indochina Peninsula Corridor (see no. 4 on figure 9.1a), which also contains the China-Laos Economic Corridor.
SOURCE: Georg, Blaschke, & Taubenböck (2016): figure 7.

the Chinese state and its planned and built infrastructure projects across international boundaries (X. Chen, 2022).

The global dimensions and impacts of new regionally scaled corridorization like the BRI corridors intersect with existing regional and local paths of development. A BRI corridor creates a new spatial pathway along which one or more sectoral

activities can be triggered. These can form complementary or competing relationships with extant path(s) of development for stronger growth or intraregional frictions hampering growth (Breul, Hulke, & Kalvelage, 2021). Via large and long infrastructure projects like the China-Laos Railway, BRI corridor development alters extant regional and local territories, traverses multiple national borders, impacts adjacent ecological environs, and potentially disrupts local livelihood. From specific locales and across a regional terrain, corridorized globalization associated with the BRI occurs along new economic pathways that discharge and distribute benefits and risks across previously unconnected or weakly connected places and scales.

CORRIDORIZING GREATER TRADE FLOWS ACROSS EURASIA: THE CHINA-EUROPE FREIGHT TRAIN

The seed of corridorizing regional globalization was sowed into and along the corridor-shaped Silk Road Economic Belt, the overland route snaking from China to Europe (figure 9.1A) that was conceived by the BRI to retrace and revitalize the rough geographic contour of the ancient Silk Road across Eurasia. Predating the BRI, in 2011, the inaugural China-Europe Freight Train (CEFT) carried electronics products from the city of Chongqing in southwestern China to Duisburg, Germany, through Kazakhstan, Russia, Belarus, and Poland. The number of CEFTs rose from only 17 in 2011 to 15,183 in 2021, adding up to 50,000 freight trains that ran along 78 routes between over 60 Chinese cities and 180 cities across 23 European countries plus Central Asian countries by February 2022 (China BRI Website, 2022d).

Stretching beyond the ancient Silk Road, the CEFT routes channel diverse and complex cargo flows, forming a transcontinental transport network that features three main corridors/routes (figure 9.2A). The largest number of CEFTs run along the Western route, which largely aligns with the New Eurasian Land Bridge Corridor, the older version of which linked Lianyungang and Amsterdam, while a few alternative lines of the Western route pass by the BRI's China-Central Asia-West Asia Corridor. The Eastern route connects some of China's coastal cities and older industrial cities in Northeast China to Russia, while the Northern route connects northern China to Russia through Mongolia. Both routes align with the BRI's China-Mongolia-Russia Corridor. The CEFT's recently extended intermodal routes run back east and south to sea along the China-Indochina Peninsular Corridor to Southeast Asia (no. 4 in figure 9.1A). Despite their uneven spatial coverage and access with widespread points of departure and destination, the rapidly expanded CEFT routes exhibit a geographic affinity with four of the BRI's six economic corridors.

To reveal cities forming and linking the CEFT routes, figure 9.2B presents four regional zones with subzones between China's coast and Europe's Atlantic coast, approximating the geographic layout of a Eurasia-centric map. The four zones

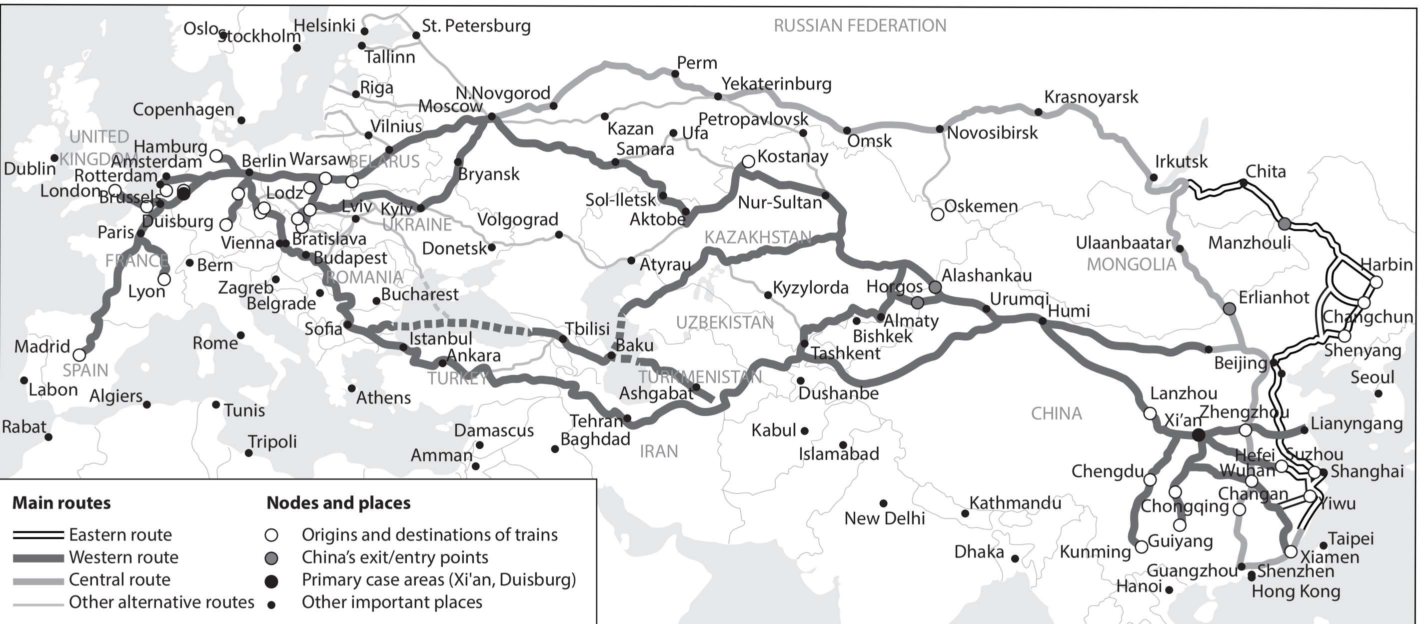

FIGURE 9.2A. The China-Europe Freight Train's Main Travel Corridors/Routes.

SOURCE: Previously published in X. Chen (2020): figure 3.

Zone 4	Zone 3	Zone 2	Zone 1
CEFT	CEFT	CEFT	
4A Europe (Duisburg, Ghent, Madrid, Budapest)	3A Central Asia (Almaty, Kazakhstan, Tashkent, Uzbekistan)	2A North-West Region (Alashankou, Khorgos, Erlianhot, Manzhouli)	1A Jing-Jing-Ji (Qingdao,Lianyungang) East Asia (Japan, South Korea)
4B West Asia (Istanbul, Tehran)	3B South Asia (Afghanistan, Nepal)	2B Central-West (Xi'an, Wuhan)	1B Yangtze River Delta (Hefei, Xuzhou, Yiwu)
4C North Africa (Algeria, Tunisia)	3C Southeast Asia (Singapore, Vietnam)	2C Southwest Region (Chengdu, Chongqing)	1C Great Bay Area (Guangzhou, Shenzhen, Dongguan, Huizhou)
CEFT	CEFT	CEFT	
a. Overland to sea b. Luxury consumer products for China (expensive cars, wine) c. Large and growing consumer markets for for Chinese products	a. Overland to sea b. Many commodities c. Plentiful energy d. Key transport routes e. Limited manufacturing f. Growing consumer markets	a. Land-locked to sea b. Many commodities c. Labour supply d. Growing manufacturing e. Smaller but growing consumer centers f. Logistics hubs	a. Sea-facing and seafaring b. Weakening manufacturing c. Growing services d. Large consumer markets e. Innovation/ upgrading f. Source of technology transfer

FIGURE 9.2B. The China-Europe Freight Train (CEFT)'s Connected Routes across Four Trans-Regional Zones.
SOURCE: Adapted from X. Chen (2021a): figure 2.

contain the departing, transit, and arriving places for a variety of CEFT routes and the general locational and economic features and activities creating and sustaining these routes (see bottom row). Zone 1 includes three subzones of China's more developed coastal cities, while Zone 2 covers three interior and border regions that have become the most active and dominant drivers of CEFTs as late developers and beneficiaries of China's "Go West" campaign. Zone 3 consists of three regions of Asia that serve as departing cities, transit zones, and final destinations. Zone 4 comprises three regions further west, featuring Europe, which anchors the other end of the CEFT system. It also includes a few cities in West Asia, such as Istanbul, and North Africa (4C), although the latter is not directly connected with China by land (X. Chen, 2021b). The CEFT has facilitated the (re)cohering of historic Eurasia and its extension to Africa via the Mediterranean, which the BRI now reaches both by land and from the Indian Ocean through the Suez Canal. The four linked zones form and thread a number of rail freight routes that channel a vast amount of traded cargo within and between China and Europe, thus generating corridor-shaped regional forces for economic globalization.

Illustrating the length of some of these rail corridors and their far reach, a freight train carrying electronic products and other goods left the Chinese city of Shenzhen (1C), bordering Hong Kong, for Duisburg on August 18, 2020. It traveled through twenty-seven Chinese cities including Chengdu (2C), exited at Alashankou (2A), passed through Kazakhstan (3A), and finally arrived in Duisburg (4A), eleven days later after a journey of 13,438 km. Labeled the "Great Bay Express," the train has since run more regularly, creating a steady flow of exports from the manufacturing powerhouse of the Great Bay Area in southern China through Central Asia to eastern and western Europe (WeChat Platform, 2020). This route's length is comparable to the Yiwu-Madrid (1B->4A) route, which spans 13,052 km, one of the longest CEFT routes. This train passes eight countries (the most of all CEFT routes), goes through three rail-gauge changes, involves relayed operation by sixty train drivers of multiple nationalities, and can take up to twenty-one days to run from China's eastern city of Yiwu—the world's largest distribution hub of small merchandise—to reach the Abronikar Rail Station, Madrid, where arrived cargo is transported on to final local and regional destinations in Spain and beyond (China BRI Website, 2022d). Both routes rank as the world's longest continuous freight train lines along the New Eurasian Land Bridge Corridor (figure 9.1A) while encompassing many shorter subcorridors that link and string cities together within and across numerous Eurasian national boundaries.

The connectivity among the growing segments of the long CEFT routes has recently strengthened and diversified through more east-bound trains and growing intermodal shipping. Along an exemplary route, a freight train would go from Europe (4A) through Kazakhstan (3A) to Chongqing (2C), which on March 16, 2018, sent the first train south to Hanoi, Vietnam (3C), via the Chinese border city of Pingxiang, Guangxi province. This rail-rail route, which reduces transport costs by one-third over sea shipping, also extends south to the Chinese port city of Beihai, Guangxi province, from which the cargo can be shipped to Singapore (also 3C) via rail-sea intermodal shipping. These subcorridors help further connect and align the CEFT's long and dominant Western route (figure 9.2A) with the China-Indochina Peninsular Corridor (figure 9.1A). This has also rendered the CEFT more balanced directionally. While every train ran from China to Europe before 2014, the return or backhaul trips in 2016 accounted for one-third of all trips and 45 percent of the total in 2019 (China BRI Website, 2020a). These developments contribute to the CEFT's solidification as a networked corridorization of transcontinental rail freight.

The CEFT's corridorization has impacted the relative positions and roles of the cities anchoring and along the freight routes in reshaping and mediating the spatial dynamics of production and consumption across Eurasia. While a few small and marginally located cities like Alashankou and Khorgos, Xinjiang (2A in figure 9.2B), have emerged as specialized border-clearing logistics centers, a number of second-tier regional hubs have used the CEFT as a logistics-led

development strategy to affect the geographic configuration and intersection of manufacturing supply chains and consumer goods flows within and between China and Europe. This local insertion into the CEFT system has unleashed new economic globalizing effects via intra- and cross-regional corridorization.

The city of Xi'an in northwestern China showcases this globalizing effect. The eastern anchor of the ancient Silk Road, X'an prospered as one of the earliest world cities during the Han (206 bc–220 ad) and Tang (618–907 ad) dynasties. Fast forward to the contemporary era, Xi'an fell behind its historic peers such as Nanjing in the coastal region and lagged far behind such coastal powerhouses as Shanghai and Shenzhen during the 1980s and 1990s. Xi'an has regained some of its lost fortune since 2000 from China's "Go West" policy and the BRI (X. Chen, 2021c). This favorable turn for Xi'an, coupled with its location at China's geometric center, positions it to leverage the CEFT as an effective logistics strategy for becoming a rail freight hub, stimulating catch-up development and generating economic influence within and beyond China.

Xi'an's logistics strategy began with the construction of the Xi'an International Trade and Logistics Park (ITLP) in 2008. The ITL Group, the municipal company in charge of the ITLP's logistics functions, launched the first train to Almaty, Kazakhstan, in 2013. In 2021, Xi'an sent and received a daily average of twelve CEFTs, which numbered a total of over thirty-eight hundred trains, ahead of Chengdu and Chongqing as China's second- and third-ranked cities, and accounted for about one-third of China's total number of CEFTs (China BRI Website, 2022d). To illustrate the far reach and broad impact of the CEFT's rapid growth from and dense concentration in Xi'an, September 2019 saw the ITL Group dispatch the first "LG block train," which carried exclusive liquid-crystal display (LCD) panels and electrodes to the factory owned by the large Korean manufacturer located in the Polish town of Sławków, 56 km from Kraków, via Ukraine. Instead of around forty days by sea, these containerized parts on a dedicated freight train arrived in the destination in ten to twelve days. Since 2019, LG has already sent over one thousand TEUs of parts to its factory in Sławków on the "Chang'an Express" after shipping them from Korea to the Chinese port city of Qingdao and then to Xi'an for Europe (China BRI Website, 2020b). By turning this logistics corridor spanning 1A->2B->2A->3A->4A (see figure 9.2B) into an economic pathway, Xi'an has helped redirect a global supply chain from East Asia via western China to central Europe. Russia's invasion of Ukraine in February 2022, however, forced this freight line to be rerouted away from Ukraine to enter Poland from Belarus. To use a much safer route, Xi'an has directed more freight trains to bypass Russia directly to the Kazakh port of Aqtau on the Caspian Sea where containers would be shipped by boat to the Azeri port of Baku and then move on trains again to pass Tbilisi and the Turkish city of Kars before going further west to Europe via Istanbul.

From production to consumption, the ITL Group has worked with Volvo in connecting and redistributing the transportation and delivery of different Volvo

cars made and sold in Chinese and European markets. In June 2018, a CEFT train departed from Ghent and arrived at Xi'an Vehicle Port with 160 European-made Volvo XC90 SUVs and V40 hatchbacks, after sixteen days. These more expensive models sell very well in China, the world's largest market for Volvo cars. In 2019, a train loaded with 160 XC60 SUVs left Xi'an for Ghent, Belgium, on an eighteen-day journey. Made at Volvo's plant in China, the XC60 were sold in twenty-five European countries including France and Germany (Yan, 2018; Fusheng, 2019). During the first three months of 2020 when China was suppressing the pandemic, twenty-seven trains from Xi'an carried 3,377 XC60s (averaging 125 cars per block train) to the European markets through a fast and secure system from truck to train without exposing the new cars to potential virus contamination (Jiangxi TV Station, 2020). Since it became regularized, this dedicated logistics corridor has sustained the flow of a major product for large consumer markets at both ends of Eurasia. Its likely robustness stems from being anchored to Volvo's spatially reorganized production and supply chains linking China and Europe.

A NEW REGIONAL GLOBALIZING PATH: THE CHINA-LAOS RAILWAY

As the CEFT has generated more corridorized trade flows via its many routes along the east-west BRI corridors, another corridor shaped by the China-Laos Railway (CLR) has recently stimulated a new economic pathway along the north-south China-Indochina Peninsular Corridor (figure 9.1A). The idea for the CLR germinated in 2010, with its bilateral agreement signed at the end of 2014 and its ground broken in 2016, and it became operational on December 3, 2021. The CLR stretches a little over 1,000 km, with about 600 km from Kunming to Mohan on the border with Laos and around 420 km from Vientiane to the town of Boten bordering Mohan (see figure 9.3). The CLR carries both passenger and cargo on standard gauge tracks in one unified electrified system across two national territories.

The CLR runs along twenty passenger stations in the China segment and ten stations for the Lao segment. It passes through ninety-three tunnels and over 136 elevated bridges within China and seventy-five tunnels and 165 bridges inside Laos. The lengths of all tunnels and bridges add up to 712 km, accounting for 76.5 percent of the entire route. To electrify the train, the Chinese builders have completed 937 km of high-voltage lines through the border (X. Chen, 2021a). Inside Laos, Chinese builders put in twenty 115-kilovolt power lines over 257 km through eleven substation intervals with ten traction substations into the Lao State Grid (China BRI Website, 2021). The CLR train was designed on the mature technology of China's Fuxing bullet train to meet the requirements of slower speed, larger capacity, and lower maintenance cost.

Running 160 km/hour carrying passengers and at 120km/hour for freight, which qualifies as medium speed, the CLR has become such a new economically

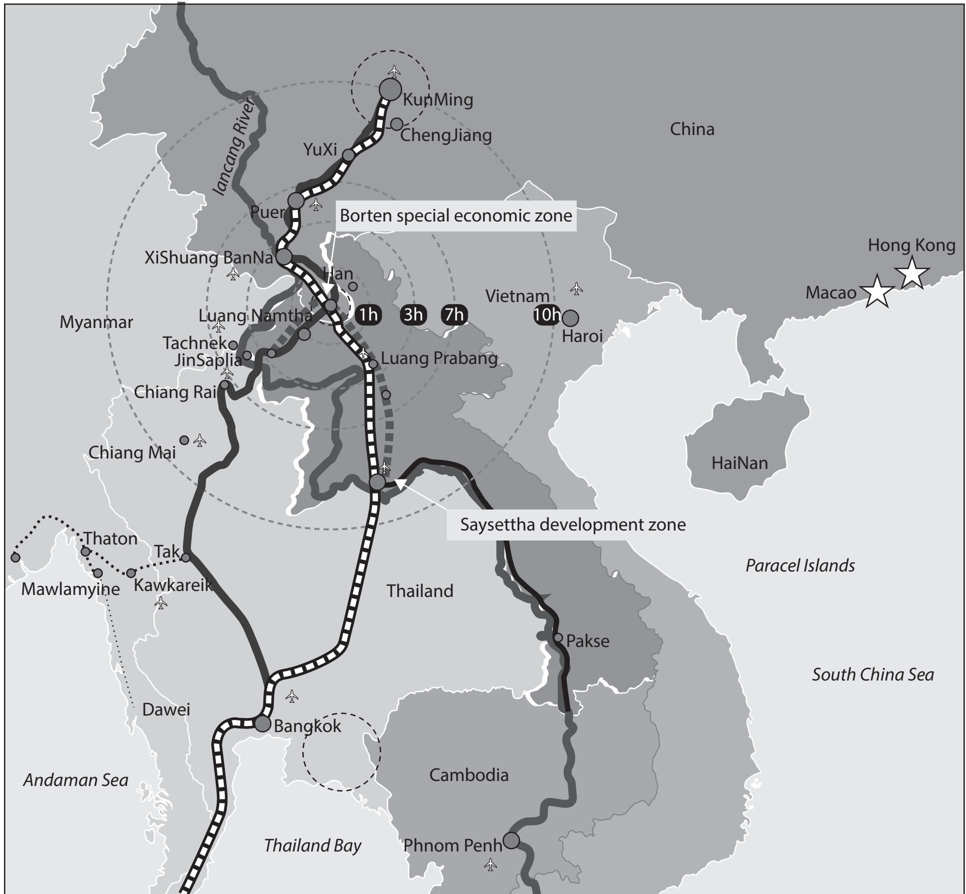

FIGURE 9.3. The China-Laos Railway in a Broader Regional Context.
SOURCE: From Yunnan Haicheng Industry Group Co., previously published with permission in X. Chen (2022): figure 6.

transformative transport artery that single-handedly turns Laos from a landlocked country to a landlinked one while also allowing landlocked Yunnan province to access the sea through Laos and Thailand (X. Chen, 2020). The CLR shortens a train trip between Vientiane and Boten to three hours from two days currently while reducing the journey from the border to Kunming to five or six hours. Since goods used to be transported slowly between China and Laos by road, only good for small quantities, or by relatively expensive air shipping, the CLR is now the happy medium carrying larger quantities of goods, especially time-sensitive agricultural goods more cost-effectively (see below) (Jun & Xuanmin, 2021). In essence, the CLR has become the spine for a train-led economic corridor with an emerging and longer-term role in stimulating trade and development along and through large underdeveloped regions on both sides of the China-Laos border.

While critics of the CLR pointed to insufficient use of Lao workers for the project and delayed compensation for them and some displaced rural households (X. Chen, 2020; Suhardiman et al., 2021), the CLR created over 110,000 jobs in Laos cumulatively, including many Laotians among the six thousand engineers and workers putting up the power transmission system at its peak. The CLR also subcontracted the use of local construction materials worth around $80 million. Its extended benefits from the construction included 2,000 km of water irrigation along the CLR's feeder roads. In addition, as part of the CLR, the Chinese government has set up the Laos Rail Vocational Skills Academy in Vientiane. With integrated facilities for administration, training, and dormitories taking up 33,000 square meters of construction space, this academy has begun to train new Lao train engineers and drivers, some of whom had received basic training in China (WeChat Platform, 2021a).

As these construction-related benefits have sunk in, the early postoperation impact via the CLR's long connective capacity at both translocal and cross-border regional scales has surfaced from a ramping-up of operating schedules. By January 2, 2022, just one month into operation, the CLR ran sixty-four passenger trains with 45,800 riders from both Kunming and Vientiane to the border, still under the pandemic closure for human crossings, and fifty freight runs in both directions carrying nearly 50,000 tons of cargo, some of which crossed the border after clearing rigid pandemic control procedures. Orders to book freight wagons going in both directions remained high (China BRI Website, 2022b). Given this early evidence on the CLR's successful launch, the Lao president gave an optimistic 2022 New Year's greeting to encourage the country to put the new train to full use (WeChat Platform, 2022).

Laos's agricultural sector, with 60 percent of its work force, stands to benefit much from the CLR. The Chinese government recently agreed to import larger amounts of Laos's main exports such as rubber, cows, rice, cassava, and tropical fruits like bananas and oranges that could be transported efficiently as bulk cargo by the CLR. The newly paved feeder roads to the CLR stations from nearby villages in northern Laos allow local farmers to transport rice, cows, and fruits to the stations for shipping to China. In 2021, Laos's exports to China as its largest trading partner were led by bananas worth $225 million, followed by rubber, cassava, corn, sugarcane, and watermelons. With a new bilateral agreement, Laos is planning to export 50,000 tons of orange-like fruits to China worth $50 million in 2022. These exports were critical to sustaining Laos's overall exports of $26.5 billion during 2016–20 with an annual growth of 10.9 percent (WeChat Platform, 2021b). As the CLR will reduce the Vientiane-Kunming shipping cost by 40–50 percent, Laos's export of corn to China is projected to grow 20 percent annually from the base of $1.7 billion in 2019 (World Bank, 2020). The CLR bodes well for sustaining the momentum of Laos's exports to China.

The CLR is also facilitating bilateral trade from the Chinese side. The Guangzhou-based Asian Potash International Co., which owns the mining rights to a

large Potash mine in Gammon province, southeast of Vientiane, quickly booked the first freight train from Vientiane to ship locally manufactured Potash fertilizer to China and can use the return train to transport materials and equipment from China for expanding local mining and manufacturing in Laos. With growing demand for its Potash products in Yunnan and neighboring Guizhou province, this company is planning to expand production for the regional market in southwestern China and will save considerable time-cost relative to sea shipping between southern China and Laos via Cambodian and Thai ports like Bangkok (Sina.com, 2021). While this appears to benefit the Chinese investors in Laos considerably, the CLR is capable of creating greater connected economic payoffs to spur production-trade ties across the China-Laos border (X. Chen, 2022).

The CLR drives more flows across the border from its hub position in Kunming, reinforced by strong cross-city transport networks within China and between China and Southeast Asia as the RECP became effective on January 1, 2022. These fast transport connections have channeled export cargos to ride the CLR from Kunming. By December 31, 2021, 380 domestic freight trains had carried 150,000 tons of cargo from Shanghai, Guangzhou, and even Beijing to Kunming bound for Southeast Asia (China BRI Website, 2022c). Thus far, four freight trains destined for Vientiane directly have run from Shenzhen, Nanjing, Chengdu/Chongqing, and Huaihua, Hunan province, to and via Kunming. This growing cargo flow from Kunming and the rest of China to Vientiane and other Southeast Asian markets within a short period of time is poised to diversify further and thus enrich trade along the CLR and beyond (X. Chen, 2022). This will smooth and strengthen the longer and wider movement of goods between deep inside China and its neighboring concentric subregions of Southeast Asia (figure 9.3) along the China-Indochina Peninsula Economic Corridor.

Even if Kunming, Vientiane, Boten, and other small cities work together to link both passenger and freight movements along the CLR, both may still fall short of their combined full potential benefit unless the CLR is seamlessly docked with the planned China-Thailand High-Speed Railway linking Kunming to Bangkok, especially after RCEP became effective. As of now, the Laos-Thailand train connection is confined to the old meter-gauge track left by the French colonialists between the Thanaleng Rail Station on the Lao side, away from the Vientiane Station, the CLR's terminus south of the city, and the Nong Khai Station and land port on the Thai side of the border defined by the Mekong River. On December 7, 2021, the fresh vegetables that arrived on a CLR freight train had to be picked up at Vientiane by thirty-three Thai trucks from Nong Khai to be forwarded to the rest of Thailand (China BRI Website, 2022a). While this saved a lot of shipping time and cost less than road transport from China to Laos and then to Thailand, it begs the creation of a direct and smooth Laos-Thailand connection.

The Thai government supports the building of a 5.35-km-long meter-gauge rail line from Thanaleng Station to northern Vientiane, already 70 percent completed, for improved near-border transport. This solution, however, still misses a direct

link to the CLR, although the Thai government is planning to build a new railway bridge next to the Thai-Lao Friendship Bridge over the Mekong in anticipation of the forthcoming direct train traffic from the CLR to the China-Thailand Railway. Designed to run at 180 km/hour over 250 km within Thailand, the high-speed railway will ultimately connect Bangkok north to Nong Khai, where it will be seamlessly docked with the CLR. For now, this sustains a missing link through Thailand for the CLR to connect to Malaysia and Singapore as envisioned by the Trans-Asian Railway network, to which eighteen Asian countries signed on in 2006 (X. Chen, 2022). In this regard, the CLR differs from the CEFT without the latter's extended subcorridors that stretch and spread trade, logistics, and other economic impacts more broadly across multiple countries.

DRIVING NEW ECONOMIC GLOBALIZATION FROM THE MIDDLE

This chapter offers a new perspective on economic globalization by differentiating the BRI corridors as new regionalizing forces that push and pull cross-border trade ties and economic connections through and along new transport/logistics pathways. This "globalization from the middle"—between the national and local scales and sources—dovetails with a renewed regional focus on the "infrastructure turn" for better understanding collective urban life (Addie, Glass, & Nelles, 2020). I have argued and demonstrated that the three pillars of economic corridors—infrastructure, urban, and economic development (Asian Development Bank, 2022)—under the BRI play a combined role in stimulating more trade, reorganizing production-consumption ties, and fostering cross-border economic integration across Eurasia and between China and Laos and beyond, via the CEFT and CLR, respectively. The most critical infrastructure dimension of regional corridorization features freight rail logistics as the leading and connecting sector and an added path of development, which in turn has reformed the comparative (dis)advantages of extant local and translocal economic pathways and dynamics (Breul, Hulke, & Kalvelage, 2021) as exemplified by stronger Xi'an-Europe and China (Kunming)–Laos (Vientiane) trade and transport linkages.

The two cases illustrate different intersections of these spatial and sectoral economic actors and activities. While appearing as very long rail routes, the CEFT comprises connected logistics corridors and subcorridors that reach far and wide in fostering new cargo flows across Eurasia, remaking it into the dominant long-standing regional arena of economic globalization dating back to the ancient Silk Road and its spinoff trade routes. Primarily a land power historically, China's return to Eurasia via the CEFT not only reinforces its early role in shaping the Eurasian economy but also extends its maritime reach as an emerging maritime economic power by forging new freight ties between its interior landlocked logistics hubs and coastal cities via intermodal shipping. The China-built

CLR, in comparison, has created a China-Laos economic corridor as an elongated regional space where new trade, tourism, and other economic activities have begun to flow and spread. As the recently operational CLR carries both freight and passengers in larger volumes more frequently, it is capable of stimulating greater transit-oriented urban and economic development along and adjacent to its route, although the CLR-driven corridor development is much more spatially confined than the CEFT.

Emerging from the global scope of the BRI-enabled infrastructure development and economic connectivity, the CEFT and the CLR embody different corridorized regional pathways of new and dense economic globalization from the middle with complex national and local consequences. This phenomenon raises new theoretical and empirical questions and challenges for the study of globalization that this chapter has aimed to address, albeit in a limited manner.

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10

The Changing Face of Globalization

World Order Crisis, (In)security Challenges, and Russia's Adaptation to Globalization

Lada V. Kochtcheeva

ABSTRACT

International trends associated with the crisis of the world order, the strengthening of the positions of non-Western players, the uncertain global cooperation, as well as the COVID-19-related health crisis entail a change in the role, place, and prominence of globalization. While the processes of globalization face many challenges, more pragmatic and realistic assessments of the phenomenon have taken place. Globalization did not come to an end and the logic of global economic, social, technological, and informational advances even promise a new phase of globalization. However, the changing mode of globalization created variable domestic responses to global forces that became unpredictable and unstable. Globalization processes develop at different rates, with different outcomes in different countries of the world. The crisis of the global liberal world order that has applied many brakes on various engines of globalization forces us to rethink the role and position of Russia, one of the major non-Western players in the world. Russia's response to globalization takes the form of a controversial adjustment to the rapidly changing external environment. Russia is developing its own vision of globalization and international politics, cultivating a pragmatic strategy based on selective and cautious receptiveness in pursuit of national interests.

KEYWORDS

foreign policy, globalization, human security, Russia, world order crisis

The very idea of globalization sparks wide-ranging debates on the nature and driving forces of global processes and on the costs and benefits of an integrated, globalized world driven by economic development, political changes, technological

breakthroughs, cultural stimuli, and improvements in communication. Globalization has acquired multiple definitions, with many of them referring to realization of extensive linkages and intensified interconnectedness, resulting in interdependence of economic, political, social, and cultural spheres. Scholars underscore "an intensification of the range and speed of contacts among different parts of the world and an expansion of the kinds of activities intimately involved in global interactions" (Stearns, 2020: 6). Advanced economic integration via market openness, intensified trade, and investment became the main instruments that provide an innovative opportunity to improve the process of production. The information and communication revolutions, as well as advances in innovation, contributed to the technology momentum. Politically and ideologically, globalization has been associated with the victory of the global liberal world order, political liberalism, and the spread of liberal-democratic norms and values from the West to the rest of the world (Kortunov, 2020b).

Recently, however, the liberal world order started to display the symptoms of decline. The decline is seen as growing discontent among a number of non-Western states over the global politics, waning Western leadership, severe competition between major powers, obstacles to growth, uneven development, and resentment of global interdependence, as well as rising populism, nationalism, and authoritarianism (Haass, 2019; Ikenberry, 2018a; Dumcombe & Dunn, 2018; Flew, 2018; Hooghe, Lenz, & Mark, 2019). The irritation and tensions about the injustices and inequalities of the global system created growing dissent and opposition to globalization in many countries (Sparke, 2013). Moreover, there are unsettled contradictions between the more globalized economic structure of the world and the political facet, in which universal and effective mechanisms of global governance have never been established (Kochtcheeva, 2020a). The attack launched by politics against economy, such as unilateral sanctions and trade wars, created direct obstacles for developing international connectedness and sharply increased the volatility of the global system (Kortunov, 2020b). The challenges to global interlinkages also made it crucial to have a new look at the notion of the universal commons, including global climate change, transboundary pollution, conservation, health, migration, and others. The COVID-19 health crisis became a massive "stress test for globalization . . . forcing a major reevaluation of the interconnected global economy" (Farrell & Newman, 2020). With critical supply chains fracturing, travel intensifying precipitous infection, and companies, communities, and entire states realizing their vulnerability, a turn in power dynamics among major world economies is taking place (Niblett, 2020). The pandemic has generated public demand for protectionist strategies in domestic policy and for nationalism in foreign policy. As such, the international trends associated with the crisis of the world order, the changing positions of non-Western players, the uneven economic landscape, as well as the COVID-19-related health crisis give rise to a change in the role, place, and prominence of globalization.

While globalization faces many challenges, more pragmatic and realistic assessments of the phenomenon have taken place. Globalization did not come to an end and the logic of global economic, social, technological, and informational advances even promises a new phase of globalization. However, the changing mode of globalization created variable domestic responses to global forces that became unpredictable and unstable. Globalization processes develop at different rates, with different outcomes in different countries of the world. Under such conditions, each country will have to rethink its strategy of struggle for survival and development (Tsygankov, 2019). The character of global instability is also determined by struggles within countries, by the levels of competition between them, and by the tensions in global and regional international political and economic spheres. The crisis of the global liberal world order that has applied many brakes on various engines of globalization forces us to rethink the role and position of Russia, one of the major non-Western players, in the world. After discussing the crisis of the global order and problems of human security, this chapter analyzes the character of Russia's involvement with globalization under the conditions of changing world order before the beginning of the war in Ukraine. It will demonstrate that Russia's response to globalization represents a contentious adjustment to the rapidly changing external environment. Russia is developing its own vision of globalization and international politics cultivating a pragmatic strategy, based on selective and cautious receptiveness in pursuit of national interests. The chapter concludes by emphasizing a critical need for adjustment between global and domestic elements due to the changing capacities and interests of states, and the failure of current global arrangements to cope with the challenges associated with globalization.

WORLD ORDER CRISIS, HUMAN SECURITY, AND GLOBALIZATION

Global Order Strain and Globalization

The crisis of the global liberal world order is having a significant impact on globalization. Passionate debates continue on when precisely the turning point in global processes happened and what its specific signs and implications are. First, many would argue that the crisis of the global order might be steering the world into a kind of post-Western global system (Ikenberry, 2018a, 2018b; Wojczewski, 2018). China, Russia, India, Turkey, and other powerful non-Western states are launching their own agendas and ideas for globalization and global order. These actors are challenging the remains of the Western unipolar system, and their ambitions to play a more prominent role in international relations are getting more obvious. However, these countries have different ideas about global transition. While China emphasizes economic leadership, Russia focuses on the governance values, such as national sovereignty, security, and freedom of political and cultural choice.

The crisis of the global order may also be seen as "the foundation for new international connections and solutions" (James, 2021), where countries are involved in pragmatic and "practical, non-ideological, issue-based cooperation" (Acharya, 2017: 282). The conditions of global transition signal that "the post-Western and U.S.-centered world orders will have to learn to coexist to avoid mutually dangerous clashes, while competing for new opportunities on the global scale" (Tsygankov, 2019: 55).

Many non-Western antiglobalists recognize globalization as disadvantageous, creating increased domination by the highly developed nations over the less developed societies, exacerbating economic disparities, and eradicating cultural values and traditions (Hebron & Stack, 2017). While antiglobalists insist that unequal distribution of benefits and the imbalances in economic outcomes and rule-making will keep producing backlashes and further undermine the world economy, many emerging non-Western states are not abandoning globalization. Rather, they are attempting to build leadership and influence within the global system and continue to exploit the benefits of globalization. The economic capacity of China and India underscores the rising role of non-Western states in global governance, specifically in the realm of the international financial institutions and monetary system (Duncombe & Dunn, 2018). Additionally, China's intricate strategies for the launched Asian Infrastructure Investment Bank and the One Belt, One Road vision for Eurasian economic cooperation are strong signals of it supporting globalization and even advancing globalization.

Second, some analysts and observers link the change in globalization and global development trends with the weakening of Western/U.S. leadership (Niblett, 2017; Kortunov, 2020a). The most widespread conception of globalization emphasizes westernization, and specifically Americanization of the world. As such, globalization has been understood as the spread of liberalism, rationalism, capitalism, and democracy around the world (Kochtcheeva, 2020b). The aims of the Western and largely U.S. "liberal hegemony" were the promulgation of liberal democracies around the world and promotion of open international economy (Mearsheimer, 2018: 1). Yet, despite its unrivaled power, the United States "did little to address the widening gap between global challenges and the institutions meant to contend with them" (Haass, 2021). The antiglobal and illiberal actions that characterized the U.S. actions, such as withdrawal from a number of multilateral treaties, invasions of Afghanistan and Iraq, and the position of the Trump administration on trade, environment, and alliances, have been in sharp contradiction with the processes of globalization. President Trump's determination to turn to largely national and domestic ways of development, as well as the withdrawal from a number of international agreements, "imperiled" globalization (Patrick, 2017). His rejection of two international integration projects, the Trans-Pacific Partnership (TPP) and the Transatlantic Trade and Investment Partnership (TTIP), signaled to the world that the expansion of the liberal trade regime did not benefit U.S. domestic interests and society. The beginning of the crisis is also marked by the outbreak of the

U.S.- China trade and technology war in 2017–18 (Kortunov, 2020b). The unfolded global circumstances of these conflicts are the result of the United States abandoning "its multilateral cooperative positions for the primacy doctrines" (Steinbock, 2018) and the failure to adapt to China's rise (Haass, 2021). Still the turning point could also be traced in the slightly more distant past, pinpointing the Global Financial Crisis of 2008–9, when the global community missed its opportunity to create a new and more efficient way to manage the global economy (Flew, 2018). After the crisis, China and large emerging economies fueled the international economy, which was consequently spared from a global depression. However, as G20 cooperation subsided, so did global growth prospects and the future of global economic integration (Steinbock, 2018). Currently, President Biden promises to provide global leadership by strengthening the transatlantic community, encouraging globalization, upholding alliances, and promoting liberal democratic solidarity, which is highly valued and celebrated by the globalists.

Third, the changes in globalization are progressively shaped by the challenges that countries face domestically and internationally. Globalization highlights the uniqueness of each state and society against the backdrop of interdependencies and communication with other states and societies. The pressure to conform to globalizing processes is reframing the nature, role, and functions of the states, causing states to adapt to global economic and political circumstances or demonstrate resilience and will to determine their own economic, social, and political policies. Domestication of decisions affects the functioning of the global order and remains the challenge to that same order. States, especially strong ones, continue to defend and promote sovereignty and act in a way that reflects their national interests (Kochtcheeva, 2020b). Domestic policies towards trade and investment are naturally political and cannot be estimated merely by reference to their efficiency and cost. Income inequalities are growing both between and within countries, concerns about national security are becoming paramount, and trust between countries is in decline (Strange, 2020). Multinational businesses feel the need to tackle the pressure between being globally competitive and being locally responsible to the domestic societies (Madhok, 2021). Additionally, the COVID-19 pandemic has pushed for nation-centric policies, especially trade protectionism, "driving the trend of deglobalization" (Heungchong, 2020). However, no strictly independent solutions seem to be possible. Today's world is characterized by a far greater degree of complexity and interdependence, which means that reducing current global relations to traditional intercountry relations is an unreasonably complicated if not an impossible enterprise.

Finally, the distress in the nature of globalization, stemming from the crisis of the global order, may lie not in the phenomenon as such, but rather in the incapacity or reluctance of the international community to govern efficiently the course of globalization. It means that the principal problems of globalization are connected to the lack of global governance mechanisms that are adequate to the new realities of international life. As global leadership has deteriorated and

the rivalry between major powers has increased, including over responses to the COVID-19 threat, the time has come to explore new directions for international cooperation (Heungchong, 2020). There is a need to reform existing global institutions and create new ones in order to achieve "a more delicate balance between global rules and norms on one hand and the diverse circumstances that different countries face on the other hand" (Madhok, 2021: 201). The global community of states turned out to have been unprepared for the crisis and unable to propose a well-organized and credible model for combating global common challenges, including the current health crisis. The crisis of international organizations and multilateral institutions, including the United Nations, the European Union, the World Trade Organization, and others also serves as an indicator of the incapacity of these entities to act as leaders channeling the efforts of international actors into restoring the governability of the international system. Overall, humanity's willingness to work together to fight common challenges, be they disasters or epidemics, has been declining for at least the last decade. The features of current global politics represent the persistent promotion of nationalism and national exceptionalism, the disrespect for international law, and the prioritizing of short-term interests over long-term ones (Kortunov, 2020b).

Human Security and Globalization

The concept of human security, introduced by the United Nations Development Programme in 1994 (UNDP 1994), is widely celebrated as a welcome change to conventional understandings of security. While traditional concept of security revolved around military preparedness against foreign adversaries, and the protection of scientific and security information, a new vision of security focuses on human vulnerability issues across the globe. It is a more comprehensive concept addressing violent conflict, as well as resource exhaustion, health pandemics, poverty, human rights violations, and environmental degradation. Today, human security is a catchword for describing the difficult challenges that individuals, societies, and the whole global community face in attaining safety and well-being in an insecure world (Homolar, 2015).

A comprehensive and more nuanced understanding of globalization should take into account the simultaneous emergence of multiple dimensions of structural and relational reality, which includes socioeconomic, political, cultural, technological, informational, as well as security components. As a process, globalization is powerful, because it places a human dimension into a steady focus. Human security problems, which are clearly manifested in new nonconventional areas, such as cyber security, energy security, food security, environmental security, and others, especially deserve attention in the global world since many of these problems are of a pronounced global, not regional or local, nature. Ideally, globalization offers new opportunities for addressing the problems of human security, jointly preventing disasters, combating pandemics, international terrorism, and

climate change. In a world facing enormous challenges, solutions are global public goods (James, 2021). As such, globalization can also serve as the necessary arena for protecting universal human interests.

The majority of current human development and security challenges arise from numerous circumstances that are interconnected and mutually reinforcing under globalization (UN, 2016). Countries respond differently to the opportunities and challenges of globalization due to their domestic political, socioeconomic, and cultural situations. In a very similar vein, because conditions for human security differ considerably across and within countries, and at different points in time, human security reinforces national solutions, which are tailored to domestic experiences. While national governments hold the major role and responsibility for guaranteeing the safety, survival, and well-being of their citizens, the function of the global institutions and community is to provide the necessary support to states upon their request, "so as to strengthen their capacity to respond to current and emerging threats" (UN, 2016: 6). Achieving greater human security necessitates more effective cooperation and partnership among states, by addressing the actual causes of problems and by developing solutions that are in themselves sustainable and resilient.

Both human security and globalization emphasize the interconnectedness and interdependencies of multiple actors and institutions in the world. Both require an assessment of opportunities, capacities, risks, and challenges. Globalization can and does influence human security through political, social, economic, and cultural transformations. On the one hand, globalization may improve human security by enhancing economic well-being, improving cultural understandings, and providing greater levels of political empowerment and personal freedom. On the other hand, it may exacerbate many human insecurities by increasing uneven development, eroding cultural identities, promoting environmental degradation, and alienation, especially in the developing countries. Globalization, as a powerful, transforming force, initiates variable changes geared toward affecting human life. Therefore, the challenges of human security require an integrated global multilateral response by the global system, a consistent human security approach that focuses on the globalization of responsibility (Sommaruga, 2004).

RUSSIA'S ADAPTATION TO GLOBALIZATION

Russia's experience with globalization is highly complex and diverse. Since the end of the Cold War and the collapse of the Soviet Union, Russia has been challenged by the need to fundamentally reconstruct its state, political and economic institutions, identity, power, and international image. The country struggled to do so in the threatening, challenging, and unusual environment of the globalizing world. In the early 1990s, Russia made a strategic decision in favor of integration into West-promoted globalization, as it promised extensive prospects for economic

development, trade, scientific connections, technology breakthrough, communications, and enhancement of cultures via the spread of norms and ideas.

Russia endured an overwhelming political and socioeconomic transition and incorporation into the globalizing world, adopting the Western course of transformations. The country was also trying to regain its strength and get back to its own roots, as well as give meaning to the confounding changes in the world around. The West welcomed Russia's transformations, assuming that Russia's interests would be similar to most of its interests and goals. However, by the late 1990s many contradictions became obvious. Russia inherited Soviet nuclear capacity, abundance of natural resources, and permanent membership in the UN Security Council, yet the country essentially lost almost all the advantages of a superpower (Nikonov, 2004). Russia was hard-pressed to verify its international standing and recognition, as well as plead for economic assistance. It had become an internally weak state with porous borders, a frail army, an undetermined identity, and an absence of reliable allies. Understanding its economic and technological backwardness and the limitations of the existing political institutions for conducting an independent foreign policy, Russia accepted U.S. global leadership, and its goal became to find a suitable place in its framework.

Relatively quickly, however, Russia developed significant disillusionment with the positions of the West, which used the advantages brought by the end of the Cold War, including NATO's eastward expansion, while Russia bore massive costs in all areas of transformation (Kochtcheeva, 2020a, 2020b). The West continued to celebrate an unforeseen victory and proclaimed a new world order based on liberal principles, while Russia struggled to survive fighting economic challenges, wars inside its own territory, and social demoralization. Russia was still enthusiastic about the possibility of joining international regimes and organizations, yet this sentiment started gradually giving way to suspicions and growing uncertainty concerning the value that such memberships could have for Russia. Hesitations began to surface as to whether globalization and economic interdependence had the ability to control international political tensions and conflicts (Kortunov, 2020b).

Significantly, Russia's hopes to enroll into the community of the Western states on a more or less equal basis were not fulfilled. The country did not agree with Western expectations and plans for its transformation, while the West was not able to interpret correctly Russian motivations and behavior (Torkunov, 2012; Monaghan, 2016; Bordachev, 2018). There was a continuous concern in the West that Russia would not fit institutionally, strategically, and normatively. NATO's eastward enlargement also made Russian politicians believe that the West was not going to give up protecting its strategic interests and was not interested in a strong, revived Russia (Torkunov, 2012). During the decade after the end of the Cold War, no new power arrangements were established and Russia stayed outside the collective security system represented by NATO, which resulted in a series of

negative implications, including a sense of exclusion and alienation. As such, at the beginning of the twenty-first century, Russia was compelled to create a new concept of global relations, outlining the conditions for great powers to recognize the security, sovereignty, and other national interests of other countries in a legitimate manner (Tsygankov, 2014; Safranchuk, 2019). Russia has adopted a different set of priorities and attempted a more selective approach. In political and economic relations, the country insisted on preserving state sovereignty and the right to defend itself against external destructive influences, as well as to promote its own vision of globalization. As a reemerging state, Russia strove to determine its role in a globalizing world and to ensure that the post–Cold War power shift would be characterized by interdependence and interlinkages, as well as an expanded collective security system. Yet, any Russian attempt to fit into the political, ideological, and value system created by the West without Russia's participation and without taking its interests into account did not agree with the implied one-sided adaptation to the West-promoted liberal order (Lukyanov, 2020). Russia became "trapped into a strategic impasse," where it could be "a great power but an outsider; or a member of the Historical West, but at the price of renouncing its autonomy as a great power" (Sakwa, 2017: 9, 23).

In the society, the anxiety about globalization was amplified by the belief that globalization was not a result of impersonal forces of interconnectedness and integration, but rather that globalization was controlled by the outside hegemonic project of the West. Attempts to build a competitive market economy and a democratic polity collided with the historical legacy of autocracy, identity struggles, and developmental strains. The complexity and costs of the formation of a new political and economic system in the Western manner appeared to be much higher than could have been foreseen. As globalization increased its pace largely based on the advances in technological innovation and information economy, Russia realized its technological and economic backwardness. Globalization became mainly associated with the "shock therapy," the collapse of the system, and inability to preserve previously achieved living standards, which led to social and economic deprivation (Kochtcheeva, 2020b). Entering globalization through liberalization and privatization was accompanied by a hostile attitude toward these phenomena, and the revival of the ideas of nationalism and patriotism. Economic and social reforms and the inclusion in integration processes were contrasted with the ideas of a strong state, sovereignty, and the uniqueness of Russia's own development. Additionally, many Russians perceive the globally promoted concepts of freedom, justice, and order, not as conflicting binary rivals, but as values that are equally necessary for the normal life of the country and every individual. Globalization as westernization did not bring the expected benefits and threatened to transform sovereignty, statehood, and society. Russia preferred to follow its own path of development, defending its own national interests and its role in the international arena in the context of both positive and negative outcomes of

globalization. Russia chose to transform itself from a dedicated follower of the West to its critic, pursuing expansion of its influence in global decision-making, institutions, markets, and values.

As globalization continued its advance, Russia demonstrated a complex and even contradictory relationship with it, oscillating from adaptation to confrontation with the global order. On the one hand, the official rhetoric indicates the desire to transform Russia into an integral part of the global economy. On the other hand, the risks associated in one way or another with globalization, such as deepening inequality, increased financial instability, and the spread of cross-border economic crime, are constantly brought to the discussion. Emphasis is also repeatedly placed on preventing globalization from undermining the standing of nation-states as the principal actors in global politics and economics (Kortunov, 2020b).

The results of globalization in the late 2010s indicate that Russia's efforts to integrate into the global economic interlinkages in the 2000s were only marginally successful. Rich in natural resources, with significant liquidity, declining poverty and unemployment, and strengthening currency, Russia was becoming a force among the global emerging market nations, taking the twelfth place in the world by nominal value up until 2013 (Kochtcheeva, 2020b). Yet, a gradual decline of economic growth emerged and was accompanied by increasing disparities in manufacturing, decreasing innovation by producers, intensification of imbalances of technical characteristics of fixed assets, and investments in fixed assets by principal economic activities. Reliance on natural resources and a highly energy-focused economy still serves as a double-edged sword for Russia, leaving the country vulnerable to credit and commodity market fluctuations. The structure of Russia's exports changed little, and the country is still unable to become a full-fledged member of global technological chains. At the same time, Russia's dependence on the outside world has been increasing, which produced new economic and political risks. The financial crisis of 2008–9 was unanticipated and very distressing for Russia. However, in 2014, when Russia-West relations came into an acute crisis, Russia's global integration agenda became the geopolitical agenda (Kortunov, 2020b). The Ukrainian crisis of 2014, the imposition of sanctions, falling oil prices, and continued geopolitical uncertainty created an increasingly difficult situation in the Russian economy, and it became much harder to create a well-devised alternative to Russia's comprehensive integration into the global economy. Russia continues to experience complex challenges posed by the direct need for economic adjustment to external challenges coupled with major internal long-term changes in its economy and society. Currently, the external shocks, including the fight against COVID-19 and the crisis with Ukraine, coupled with preexisting structural inefficiencies and lack of innovation, as well as weakened consumption and investment, impact Russia's growth prospects. A more successful realization of economic globalization will depend on involving main economic actors in the process of developing innovative changes, implementation of the technological

breakthrough, and achieving accelerated developments in priority industries, which can provide for the transition from aspirations to achievements.

In the context of world order transition, the current health crisis, uneven globalization, and the rise of non-Western powers, Russia is reassessing its role in the world, its interests, and relations with the West. Russia started to see itself as one of the most important players in the international arena, advancing its own conditions in shaping the global order, interweaving involvement with skepticism and openness with nationalism. Russia has developed a very aggressive foreign policy defending its security and statehood, and it is overtaken by discussions of a profound crisis of the liberal world order and of the relevancy of the Westphalian principles of structuring the international system. The country assigns itself a special role in global processes, protecting its own sovereignty, identity, independence, and security. Russia's response to globalization does not seek to isolate the country from the international society, but it challenges the prerogative of the West to define its norms and order. This view presupposes the establishment of a natural balance, sensibly taking into account the most important interests of each country in world affairs. It does not challenge the foundations of international society, but it rejects the practices of the unipolar power system.

Russia seeks a global strategy as a participant in creation of the norms and rules for the new globalizing world order together with other actors. It views this new order as polycentric, where old architects and new builders of globalization participate in organizing and structuring world and regional orders, participate in global governance, and have certain autonomy in conducting foreign policy. In the last decade, the strategic line of Russian international behavior has also consisted of challenging the West-promoted globalization to secure the search for new rules of the game in global multipolar politics (Kanet, 2018). Russia has already demonstrated that it can handle some of the most acute challenges of regional and global security. As the world is developing further by going on a new level to the system of states interconnected by globalization, the gap between exacerbation of the global problems, on the one hand, and nationalization of their solutions and deglobalization of governance, on the other hand, is growing. Taking into account all the difficulties and challenges that Russia is facing as a result of the unstable global situation, exacerbated by the continuing COVID-19 crisis, Russia was better prepared for the crisis than many of its partners and competitors. The West is fixated on Russia and the traditional security agenda, and this obsession was of no help in responding to the crisis and its challenges. For a long time now, Russia's strategy has been largely devised to deal with an unfavorable international environment, a world where geopolitical interests prevail over economic practicality and international conflicts prevail over cooperation. However, effective global strategy is only possible if the country demonstrates its ability to cope with the economic recession and the pandemic while incurring minimal losses to living standards and retaining the prospect of a rapid postcrisis economic growth. A much more

challenging undertaking, though, is defeating the attitudes that currently prevail in Russian society, including the feeling of self-sufficiency, tremendous skepticism of the outside world, and isolationism, rooted in Russia's historical experience, national psychology, and social instincts. Russian society will benefit by appreciating the opportunities for its own development, and not just assessing the security challenges (Kortunov, 2020b). The major goal for Russia's global strategy is to help domestic society integrate itself into the coming global world without sacrificing its national identity to globalization.

Nevertheless, among the opportunities presented by the current crisis are the prospects for Russia to more actively advance its vision of the nature of the current international system, its development drivers, and the desired parameters of the new world order. It is an opportunity to show that it is also a skilled architect who is prepared, along with its partners, to advance individual mechanisms, principles, and models of the new world order that is still under construction (Ivanov 2019). The development of new ways and niches of international cooperation for the future is of growing importance. Such areas as global energy security, food security, cyber security, and cooperation on climate and environmental issues are promising. A core task is the elaboration of a global system that would ensure stability and security in the world, make rules of conduct for the global economy and trade, and defuse the existing challenges and risks while preventing the emergence of new ones (Kochtcheeva, 2020a). There are objective preconditions for shaping an inclusive global order in which each state would assume its share of responsibility for the future of humanity, and in which the global community protects international law and the legitimate interests of each of its members.

Russia's adaptation to globalization should be viewed as an outcome of a constant adjustment to the ever-changing global and domestic challenges and the way Russia's sources of power and identity have developed. Russia's systemic vision of the world and its own role in the global order encompasses the goal of supporting mutually beneficial frameworks and partnerships guided by the principles of sovereignty, practicality, openness, and commitment to uphold national interests, yet contributing to international cooperation on a nondiscriminatory basis.

CONCLUSIONS

Globalization brought the countries of the world into the web of interconnectedness, pushing them to address the problems of economic development, security, innovations, access to resources, technology, and value systems. The discontents of interdependencies uncover the fact that, while the problems reveal globalizing tendencies, many responses to them remain domestic. The crisis of the global world order indicates that there are limits to the borderless nature of globalization that can be set by national governments. The global setting started shifting, and the

challenge for the countries became one of figuring out how to build international relations, foreign policy, and domestic responses when crucial facets of the international order are in motion. The deep cut between the interdependence of states and their inability to reach an agreement, to build a more or less stable system of international relations that is not reduced to constant geopolitical squabbles, creates a difficult situation. A significant element of adjustment between global and national elements is needed as a result of fluctuating capacities, uncertain inclinations, growing ambitions, and the inability of current arrangements to cope with the challenges associated with globalization. Countries need a new concept of the world order and a radical new look at globalization.

It is worth mentioning that the transformation of the global world order should not focus on the eradication of the social, cultural, and humanistic gains that have been attained throughout the course of globalization. The central feature of the emerging world might be the absence of universal ideas about the "correct" structure, behavior, and values of individual states (Valdai Club, 2018). Especially, the multiplicity of forms of political structure and social inclinations may increase, and the willingness of states and societies to adjust themselves to some uniform external patterns may likely lessen. Refuting the imposition of standards and values should not discount the willingness to imitate the successful types and models of development in the interests of domestic progress and global well-being and security.

What form could the political, legal, and economic basis of a new world order take that would ensure global development, security, and stability? Hardly anyone could propose a plan for world development, yet realistic parameters for the prospect of a global transition to a new international system and a new balance of power are important for Russia and other emerging powers. What is needed is not only a clear understanding of the country's national interests, but also a clear understanding of its capabilities and weaknesses. The changing international situation demands from Russia and other countries a flexible and timely response to new challenges, which arise in the course of the evolution of the entire system of global development. Without a doubt, the role of human security factors—education, science, health, culture, environment—should increase in the system of global interconnectedness as globalization opens up windows of opportunity for cooperation in exceedingly varied realms of human activity, alleviating international excesses. To overcome the crisis, the world powers need to agree on the mode of interaction and divide the problems into those that can be solved and those that cannot be solved but can be managed. Humanity is faced with the task of creating a new global system that will reduce political, economic, climate, and resource risks and present a new viewpoint based on the balance of power and multilateral security, rational use of resources, social justice, and respect in international relations.

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11

India's Evolving Experiment with Neoliberalism

A Confluence of Mental Models

Ravi K. Roy

ABSTRACT

Since having achieved its independence from the British in 1947, India has continued to adapt its political and economic models to meet the challenges and imperatives posed by an ever-shifting global environment. Beginning with India's shift from socialism (1947–91), which ushered in a revolution known as "neoliberalism by storm" following its historic currency crisis, this chapter focuses primarily on India's next evolution, known increasingly as *authoritarian neoliberalism* and beyond. Appearing to engender antiglobalization populist elements (as evidenced by current prime minister Narendra Modi's fiat dictates aimed at demonetizing the national currency as well as severing multiple free-trade agreements), this next phase appears to embrace a mercantilist-style, strong-state, command-and-control ethos. This *illiberal* evolution of "neo-liberalism" is a highly nuanced and complicated model, fraught with paradoxes and contradictions that need to be better explored and explained.

KEYWORDS

globalization, India, mental models, neoliberalism, populism

Since having achieved its independence from the British in 1947, India has continued to adapt its political and economic models in accordance with the needs of the country as perceived through the cognitive lenses of various governing regimes. Beginning in the mid-1980s, Indian leaders have become increasingly sensitive to the challenges posed by an ever-shifting global environment. This chapter selectively focuses on leaders who have influenced specific inflection points in India's

evolving experiments with economic mental models. In that vein, we will explore the distinct neoliberal frameworks that were adopted under India's various prime ministers, providing specific emphasis on the shift from the global cosmopolitanism that first appeared under Prime Minister Rajiv Gandhi in the mid-1980s to the recent nationalist-populism that has been embraced by Prime Minister Narendra Modi. That said, it is noteworthy that the Mont Pelerin Society (MPS), which many associate with the intellectual birth of neoliberalism, will be holding its seventy-sixth general meeting in New Delhi in the fall of 2024. According to the conference organizers, New Delhi serves as an "ideal host," given that the MPS founding in 1947 coincides with "India's political independence from the colonial powers, after nearly 200 years of tyrannical rule and exploitation" (https://mpsnewdelhi.org/about/.)

As we shall see, India's evolving experiment with neoliberalism has been neither continuous nor consistent. Therefore, one should not characterize any of India's various experiments with market capitalism as monocratically neoliberal. At the same time, one must not ignore the remarkable market transformations that India has experienced over the last four decades. Market reforms undertaken in India are interwoven within a central economic planning framework that was developed in the middle of the last century. These reforms, therefore, reflect many of the characteristics of the rigid and discombobulated statist bureaucratic system through which they were developed and implemented. In order to understand India's ongoing neoliberal experiment, one must take a deep dive into the socialist institutional framework from which it has evolved.

India's neoliberal journey has been punctuated by distinct "phases" in which discrete ideational systems were embraced by different political leaders. Today's leaders inherited elements of the ideational systems of their predecessors that have survived, grafting parts of them into their own economic models and policy agendas. India's ongoing experiments with neoliberalism reflect the confluence of these distinct models over time. Traces of India's socialist central planning model have been more prominent in the neoliberal agendas of some leaders and less so in others. As we shall see, more ardent free-market policy reforms that were adopted under Western-style capitalist-leaning regimes, such as those led by Prime Minister Monmohan Singh, may have been "watered-down" or in some cases reversed altogether by more recent leaders. Modi's fiat dictates aimed at demonetizing the national currency as well as his severing of multiple free-trade agreements, for example, appear to reflect a nationalist, and in many ways antiglobalist, strong-state, command-and-control ethos. The ultranationalist rhetoric interwoven in Modi's *illiberal* expression of "neo-liberalism" engenders strong contradictions and paradoxes that have been the source of much confusion and debate. Indeed, Modi's muscular state-centered policy agenda can be referred to as *authoritarian neoliberalism*. In

this chapter, I will endeavor to untangle the various experiments with market capitalism that have been bundled under the broad umbrella of neoliberalism.

CONCEPTUALIZING INDIA'S NEOLIBERAL EVOLUTION AS A SET OF MENTAL MODELS

Generally speaking, *neoliberalism* is a contested concept that has been associated with various promarket capitalist leaders across the globe since the late 1970s (Roy, Denzau, & Willett, 2006). Associated with national leaders ranging from Margaret Thatcher and Ronald Reagan all the way to Augusto Pinochet and even Deng Xiaoping, the term is mired in confusion and controversy. Indeed, the broad application of the term makes any kind of systematic conceptual analysis extremely difficult, if not intractable. Despite these challenges, studying how neoliberalism in its various forms and guises has been shaping the world's largest democracy since the 1980s remains a worthwhile effort.

In previous analyses on the subject, we have found it useful to conceptualize the various applications of the terms as subsets of distinct, but related, strands of a system of "mental models" that share a common ideational backbone (Roy, Denzau, & Willett, 2006). Each of the strands of neoliberalism that we will explore in this chapter engenders its own set of distinct characteristics. That said, all of them appear to share a set of core beliefs that warrant deeper exploration. The application of Arthur T. Denzau and Douglass C. North's (1994) seminal work on "Shared Mental Models" can provide us with a useful framework for conducting this kind of deeper analysis (Rongala, 2007).[1]

What are mental models, and how are they useful for our analysis of the variety of neoliberalisms that have come to shape modern India? According to the 2015 World Development Report titled *Mind, Society, and Behavior*, "mental models include categories, concepts, identities, prototypes, stereotypes, causal narratives, and worldviews . . . [And indeed] without shared mental models, it would be impossible in many cases for people to develop institutions, solve collective action problems, feel a sense of belonging and solidarity, or even understand one another" (World Bank, 2015: 62–63).

At a general level of analysis, neoliberalism is an ideological construct that has surfaced in tandem with the emergence of globalization. Some scholars regard neoliberalism as a set of ideas that have served as the ideological foundation that facilitated the rise of globalization, while others see these terms as interchangeable. Neoliberal policies promoted by the World Bank and the International Monetary Fund (IMF)—which include free trade, fiscal responsibility, deregulation of the economy, privatization of public services, growing financialization of economy, and so forth—have been enshrined in an institutionalist policy framework that was initially referred to by economist John Williamson (1990) as *The Washington Consensus* (WC). The WC, however, is merely a policy heuristic; it is not a framework of analysis. The mental model framework, on the other hand, provides us

with a useful tool for analyzing the ideational systems that have informed India's ongoing experiments with neoliberalism.

As suggested above, India's neoliberal evolution is complicated and has always reflected a confluence of various mental models. Ironically, many of India's policy-making institutions that continue to shape the nation's experiments with market capitalism were developed during its early socialist development period (1947–84). Suspicious of the rise of a capitalist class that would place the desires of selfish individual gains and short-sighted pursuits of personal wealth ahead of national development needs, India's first prime minister, Jawaharlal Nehru, adopted a *developmentalist* state-planning model based on socialist principles to direct his country's economy. By emphasizing collectivist ideals over Western liberalist ideas that promote free trade and entrepreneurial individualism, Nehru's central planning model placed the fate of India's national economic destiny in the hands of the state.

The Nehruvian model focused first and foremost on government-led industrial development initiatives that were meant to ensure the equitable distribution of the country's domestic resources. Nehru's model drew inspiration from Fabian democratic socialist ideals emphasizing human rights and political freedom. Individual entrepreneurial freedoms, however, were subordinate to state-led industrial policy objectives. At the same time, Nehru rejected Marxist-Leninist forms of authoritarian collectivism that were quickly being embraced by China. The Nehruvian central planning model embraced a *democratic* federal system that involved sharing powers with the states, which often take center stage in Indian politics.

Nehru's developmentalist state program introduced a host of protectionist measures that were designed to shield India's domestic industries from international competition. State-owned enterprises (SOEs) would be set up and supported with government subsidies to promote industrial-led growth. State licenses—known variously as the license raj, license-permit raj, or license-permit-quota raj—were issued to specific industries that were controlled and overseen by the central government. Free-market interactions of supply and demand were suppressed in favor of command-and-control production directives that were dictated by government planners. Much like the antiquated European-style mercantilist model of capitalism famously exemplified by the British East India Company's royally licensed monopoly, the license raj undermined the virtues of free-market initiative and entrepreneurial freedom.

India's entrepreneurial growth has long been stifled by a never-ending stream of red tape inextricably woven within the burgeoning state bureaucracy. Obtaining such licenses was often a difficult and lengthy process. Consequently, entrepreneurial initiatives often died as they attempted to navigate through India's intractable bureaucratic maze. Under this "bizarre and damaging" system, as described by Gurcharan Das, a well-known critic, the process as designed is run by "underpaid, third-rate engineers" working with limited information and imprecise criteria (2001: 93–94). Soon after this licensing system was enacted, "large business houses

set up parallel bureaucracies" to "organize bribes" and thereby "win licenses"; the "opportunities for corruption" were "staggering" (Das, 2001: 93–94).

The state planning model was deepened further when Prime Minister Indira Gandhi (Nehru's daughter) assumed power in the mid-1960s, adopting a robust economic nationalist program of her own. In a massive power grab, she nationalized more than a dozen of the country's largest banks and seized control of several key financial institutions, insurance firms, and energy producers. In a brazen assault on free-market initiative, Indira Gandhi imposed new regulations on private businesses, making them unable to compete with public sector enterprises. Large amounts of waste and inefficiency resulted from the failure to provide basic essential services and infrastructure.

While the Nehruvian economic planning model focused on industrialization as the main engine of growth, the agricultural sector went largely neglected. This was a colossal miscalculation, as over three-quarters of the country's population resided and earned basic subsistence living in the rural areas. Unable to account for the widely diverse needs of millions of individuals residing across India's vast subcontinent (which is comprised of twenty-eight states and over four thousand cities, towns, and villages), India's central planning model had consistently failed to deliver on the widespread prosperity that Nehru had initially envisioned.

"LIBERALIZATION BY STEALTH": THE CLASH AND ADAPTATION OF MARKET AND SOCIALIST MENTAL MODELS

After three generations of successive rule, the Nehru dynasty cemented its political power through the expansion of the Indian bureaucratic state. By the 1980s, however, India's emerging leaders were under intense domestic pressure to address the systemic problems underlying the country's disappointing economic growth. Neoliberals claimed that the expansion of India's burgeoning and politically corrupt bureaucracy was to blame for the country's poor economic performance.

Succeeding his mother immediately following her assassination in 1984, Prime Minister Rajiv Gandhi initiated a new set of economic reforms that were meant to address corruption concerns raised by a growing number of domestic and international critics. During this period, India's parochial economy would begin to open gradually through a set of initiatives that Arvind Panagariya (2005) referred to as "liberalization by stealth" (1984–91). Building upon his reputation as "Mr. Clean," Rajiv Gandhi promoted a modest neoliberal agenda directed at licensing reform and eviscerating certain restrictions that stifled domestic market competition and export competitiveness. Through modest tax cuts and the reduction of tariffs on certain capital goods, Rajiv Gandhi managed to enhance the convertibility of the rupee, which, in turn, led to a significant increase in trade. But factional struggles within the governing Congress Party over Rajiv Gandhi's neoliberal reform initiatives, accompanied by a major corruption scandal implicating the prime

minister himself, brought his efforts to a grinding halt. Despite being relatively modest and short-lived, the symbolic success of Rajiv Gandhi's market reforms marked the beginning of the end of his grandfather's central planning model.

NEOLIBERAL "REFORM BY STORM": INDIA'S EVOLVING HEGEMONIC MENTAL MODEL

India's parochial domestic economy engendered deep structural weaknesses that would be painfully exposed in the global era. Under central government control, administrators who oversaw India's fledgling banking sector had long been issuing loans based on domestic political patronage rather than on sound investment principles and international protocols. These corrupt practices would ultimately result in a tidal wave of nonperforming loans that by the late 1980s imperiled the country's entire financial system. By 1991, under the leadership of center-left governments led by Vishwanath Pratap Singh of the Janata Dal Party (1989–90) and Chandra Shekhar of the Samajwadi Janata Party (Rashtriya) (1990–91), India's national debt (which had been mounting over many years) approached almost 50 percent of the GDP. Servicing these loans devoured valuable foreign reserves that had already been reduced to dangerously low levels. To avoid a major default, the Indian government turned to the IMF for a massive $1.8 billion bailout package.

It was during this painful period that Indian policymakers began questioning the fundamental principles underlying India's nationalist economic model. Amid the crisis, Narasimha Rao assumed power from 1991 to 1996. For the second time in India's modern democratic history, India had a prime minister who was a member of the Congress Party but not a descendant of Motilal Nehru. Typical narratives portray Rao himself as rather heroic: "a quiet, unemphatic man," who reluctantly became party leader in the immediate wake of Rajiv Gandhi's tragic assassination, but then quickly "revealed a boldness altogether at odds with what was previously known of his character" (Guha, 2007: 684). The reform-minded Rao lost no time in appointing the Oxford-trained economist Manmohan Singh as finance minister, empowering him to launch a sweeping set of neoliberal reforms that would dramatically alter the country's economic landscape. Viewing the crisis as a historic opportunity to build a new India, Singh argued that it was essential to sever antiquated commitments to Nehru's economic nationalist model. Singh's bold initiatives ushered in the next era in India's evolving neoliberal model that has been referred to as "reform by storm," which reigned from 1991 to the early 2000s. One of the most noteworthy of these neoliberal reforms was Singh's highly complicated initiative to begin dismantling the license-raj, which he undertook in the hopes of bolstering entrepreneurial-led growth.

After the elimination of most state licensing requirements in 1991, there was a popular expectation that India's corruption would soon diminish. After all, the World Bank report claimed that "policies that lower controls on foreign trade, remove entry barriers for private industry, and privatize state firms in a way that

ensures competition—all of these will fight corruption." Interestingly, India did each of these things. It not only removed entry barriers for private industry but expanded trade. Despite these measures, however, economic liberalization proved to have had almost no effect on the number or the size of corruption scandals that have long plagued the country. Neoliberals and others who anticipated a palpable decrease of corruption were disillusioned. As Shashi Tharoor recorded ruefully in the mid-1990s, "Hardly a month goes by without a new scandal emerging" (1997: 260). Sumit Ganguly, commenting on the events of 1996, said, "The year was one of turmoil in India, as it witnessed the indictment of a number of prominent politicians on charges of involvement in the so-called *hawala* scandal" and, among other things, "the leveling of charges of corruption and bribery against former Prime Minister Narasimha Rao and a number of his associates" (1997: 126). In 2000, at age seventy-nine, Rao was sentenced to three years in prison on the charge of having bribed members of a small party to support him in a no-confidence vote, though the case was dismissed on appeal in 2002.

Disillusionment with Rao's neoliberal program and its limited ability to reach the masses, however, led to the election of Prime Minister Atal Bihari Vajpayaee (1999–2004) and his nationalist Bharatiya Janata Party (BJP). Neoliberals praised key reforms that were adopted under Vajpayaee's leadership during this period. In an article published in *The Economic Times*, Indian billionaire-philanthropist Kumar Mangalam Birla (2018) asserts that:

> despite facing challenges due to nuclear sanctions, and the dot-com bust induced global recession, Vajpayee's term saw a dramatic turn which led the economy on a solid growth turnpike. With deft macroeconomic management, we saw the virtuous cycle of lower inflation and interest rates, coupled with low fiscal deficits, leading to higher investment and higher growth. Even export growth was admirable. Foreign investment inflows surged. It can be said that the foundation for high growth during 2003 to 2008 was laid in the policies of the Vajpayee government.

When Manmohan Singh eventually became prime minister himself in 2004, he wasted little time in expanding the promarket agenda that he began as finance minister. As prime minister, Singh was determined that his neoliberal reforms would impact larger numbers of people across India's highly mixed social landscape. Singh's neoliberal program was aimed at leveraging the country's vast and cheap labor markets, its growing number of educated but unemployed professionals, and its considerable natural resources to achieve unprecedented levels of growth. Standard histories of this period associate it with far-reaching economic liberalization: the elimination of most industrial licensing, the removal of import quotas, the reduction of tariffs, the encouragement of foreign direct investment, and efforts to curtail the growth of the state and reduce its spending. Strongly embracing a free-market ethos and cosmopolitan values shared by Western market globalists, Singh adopted a neoliberal program that included fiscal responsibility and sound monetary policies.

Proclaiming that the biggest obstacle to India's success in the global economy was the poor condition of its roads, ports, and energy plants, Singh pressed for the formation of multiple public-private partnerships to overhaul the country's infrastructure and supply its businesses and villages with cheap and reliable electricity. To meet his ambitious energy and infrastructure targets, the prime minister committed India to the development of nuclear power. Accordingly, Singh began working closely with American president George W. Bush (2001–9) to expand the United States' economic and political relationship to help India develop cutting-edge nuclear technology.

Jagdish Bhagwati and Arvind Panagariya have brought out that neoliberal reforms, including greater access to world markets, have raised the prices of resources such as minerals and land. This has "multiplied the scope for government officials (and colluding businessmen) to make vast sums of illegal money through the pre-reform-type arbitrary and opaque allocations of the rights to extract minerals and to acquire and re-sell land" (2013: 87). A scandal they cited was the "2G spectrum scam," where, in 2008, the union minister for communications and information technology issued 122 licenses for mobile phones at below-market prices in return for bribes (Bajaj, 2012; Bhagwati & Panagariya, 2013: 87; Thakurta & Kaushal, 2010). A more recent scandal has been the "coal allocation scam" or "Coalgate," where rights to denationalized coal fields were allocated without competitive bidding (Ananth, 2012; Bajaj & Yardley, 2012; Barry, 2015). The case "exposed the ugly underside of Indian politics and economic life: a brazen style of crony capitalism that has enabled politicians and their friends to reap huge profits by gaining control of vast swaths of the country's natural resources, often for nothing" (Bajaj & Yardley, 2012).

In the first decade of the twenty-first century, some of the positive outcomes of Singh's comprehensive neoliberal reforms were obvious: massive GDP growth reaching as high as 9 percent, exchange rate stability, and substantial increases in foreign direct investment. On the downside, his neoliberal reforms had increased the gap between the rich and the poor. Despite its impressive size and scope, Singh's ambitious neoliberal reform program that he began as finance minister and that he bolstered as prime minister was ultimately met with incredulity by some more ardent free-marketeers, leading some to proclaim that "the licence raj is dead—long live the license raj."

THE POPULIST BACKLASH: THE EMERGENCE OF AUTHORITARIAN NEOLIBERALISM

India's neoliberal model would undergo major revision once more in the latter part of the noughties. The Great Financial Crisis of 2008–9 brought the years of economic prosperity to an abrupt end, "causing rates to soar and exchange to collapse" (Subramanian & Felman, 2022). When firms began defaulting on their debts, Indian "banks were saddled with non-performing loans, exceeding ten

percent of their assets" (Subramanian & Felman, 2022). Meanwhile, nationalists saw Singh's reforms as capitulating to the pressures of global capitalists in the West, arguing that greater economic openness would undermine India's autonomy. Furthermore, as we saw, neoliberal-inspired growth, while impressive, did not appear to quash state corruption as was predicted.

In the years following the crisis, India's market-friendly initiatives have been disrupted by growing antiglobalization sentiment. Emerging nationalist and populist movements began sprouting up, demanding greater accountability, an end to political corruption, and a more even distribution of the country's resources. It was in this political environment that India's current prime minister, Narendra Modi, rose to national power in 2014. Having earned a reputation for governing effectively through honest and competent members of his bureaucracy, the former chief minister of the state of Gujrat initiated a robust populist-inspired campaign to put an end to corrupt bureaucrats who served the globally connected class of powerful elites.

Modi's image as a prominent populist leader, however, appears to clash with the views of millions of Indians who regard him as the quintessential neoliberal. In 2018, the editors of a widely read South Asian journal claimed that his nationalist BJP party had become the "pre-eminent political party of neoliberalism" and that Modi had emerged as "the preferred candidate of corporate capital" (Wilson, Loh, & Purewal 2018). Following the 2014 general election, journalists and scholars alike have referred to Modi's sweeping electoral victory as "India's Thatcher moment" (Shaw, 2014).

This comparison is not entirely without merit. Similar in scope to Thatcher's "Big Bang" initiative to modernize Britain's computer-based trading system in the 1980s, Modi invested heavily in India's physical and digital infrastructure to attract new global business. In order to bolster its competitiveness in the global high-tech sector, in 2019 Modi reduced the overall corporate tax rate from 35 percent to 25 percent. Determined to make India a leading competitor in the international manufacturing sector, Modi reduced the tax rate for new manufacturing firms to 15 percent. In addition, Modi's government has settled nearly seven billion dollars in lingering tax disputes with multinational firms and is committed to modernizing India's business tax code. In a move true to neoliberal form, in 2021 Modi privatized India's national airline—Air India.

Given these initiatives, it is not difficult to see why many have associated Modi with neoliberalism. Upon closer inspection, however, Modi's actual policy record has scarcely resembled that of a free-market neoliberal. While the national government has continued to transfer some public utilities into private hands, Modi's neoliberal platform pales in comparison to the comprehensive privatization initiatives undertaken successively by Manmohan Singh and Atal Bihari Vajpayee. Rohit Chandra and Michael Walton lucidly explain that while Modi's 2014 election victory was formally premised on a "platform of 'minimum government,

maximum governance,' it always had deep ambiguities between a pro-business, pro-rules regime and an essentially nationalist project which subordinates commercial considerations" to state directives (2020: 176).

The more "authoritarian" expression of neoliberalism embraced by Modi's government appears to reflect the confluence of both market and statist models. Though often leaning more heavily on the latter, both ideational systems are evidenced in Modi's own economic policy model. The broad appeal of Modi's populist platform has been cultivated through his party's strategic use of social media to reach the "common people" who may have felt ignored under previous neoliberal regimes. Indeed, after Modi assumed power, leaders in his party boasted that their new prime minister had become "the world's most followed leader on social media" (Sinha, 2017: 4158). Modi's successful use of privately owned social platforms to deliver his populist message to hundreds of millions of followers makes him one of the most influential neoliberals in the digital age.

Modi's nationalist project is distinctive in that it is infused with a strong dose of Hindu fundamentalism. Raja M. Ali Saleem (2021) brings out that it was in the 2009 BJP manifesto that Hindu populism appears to gain meaningful traction within the party. Modi sought to unveil his Hindu-centric political agenda in the wake of the 2002 riots in the state of Gujrat when he was serving as its chief minister. Reflecting a backlash against global cosmopolitan culture and bourgeois democratic ideals promoted under previous regimes, Modi's Hindu nationalist-populist agenda involved reversing key market initiatives that had been introduced by his predecessors over the previous three decades. One can see strong traces of India's socialist past in Modi's populist political rhetoric and nationalist policy agenda. Modi's nationalist economic policies, which include eviscerating nearly sixty bilateral investment treaties (BITs) and raising tariffs on popular imports to their highest levels in thirty years (almost 3,200 since 2014), are reminiscent of the Nehruvian era.

Perhaps the most brazen demonstration of state power over the Indian economy came in the form of Modi's decision to demonetize the national currency. In what was ultimately deemed a failed attempt to combat the rampant circulation of "black money," Modi mounted a comprehensive demonetization campaign that resulted in massive cash shortages and disinvestment. This was an especially ill-advised and highly risky move given the fact that over 90 percent of economic transactions in India are conducted in cash. With a stroke of the pen, Modi declared 80 percent of all notes in circulation to be "illegal" overnight. Modi set up a poorly conceived exchange program that left hundreds of millions of people with no access to cash required to conduct business and purchase essential items. Much of the pain was felt by small businesses and the working poor, and of those who resided in rural areas, farmers were especially hard hit. Neoliberal critics of the policy would argue that the adverse effects on the gross domestic product of the country would be felt for years to come (Chakravorti, 2017; Sambaraju, 2018).

Neoliberal economists argued that demonetization is a policy tool that should only be employed as a last resort to combat a severe monetary crisis or to root out crippling corruption. But India was not facing either of these issues at the time (Sambaraju, 2018). In fact, according to Transparency International, a global movement that monitors and reports on government corruption, India was experiencing a period of relative economic stability and an overall record on corruption that appeared to be improving (Sharma, 2016; Sambaraju, 2018). Through the adoption of this authoritarian monetary strategy, Modi hoped to bolster his image as a "strongman" who possessed not only the political wherewithal, but also the personal temperament, to tackle corruption head-on (Chakravorti, 2017). Such actions have been regarded by free-marketeers as a direct assault on the foreign investment–friendly policies that were put in place by Modi's neoliberal predecessors.

Prime Minister Modi's use of authoritarian measures to control society is further exemplified in his sometimes "extreme" approach to addressing the spread of the COVID-19 virus. His nationalist command-and-control policy approach to the pandemic has been viewed as an abject failure by neoliberals and non-neoliberals alike. Modi's nationwide lockdown mandates not only failed to abate the COVID crisis over the long term but devasted important parts of the economy by disrupting supply chains and preventing hundreds of millions from traveling to work or buying food and other essentials. As the virus spread uncontrollably, ultimately infecting well over two-thirds of the country's population, economic growth plummeted to the lowest level experienced by any major developing country (Subrumanian & Felman, 2022).

Modi's use of repressive national mandates conflicted with neoliberal strategies aimed at empowering local governments. Neoliberals are generally sympathetic to the view held by public-choice economists that people "vote with their feet" and that policy officials operating at the local level are better positioned to tailor public policies to fit the unique circumstances, norms, values, and expectations of the communities they serve. Additionally, neoliberals assert that Modi's adherence to Hindutva ideology has kept him from following constitutionally mandated secular processes that neoliberals claim would have yielded more inclusive policies. Neoliberals argue that Modi's religious-based parochial approach has served to widen existing social cleavages and divide the nation rather than bringing it together in a united effort to combat the pandemic (Guha, 2021; Viswanath, 2021).

As India's economy continues to struggle in the pandemic era, social capital is diminishing. Modi's authoritarian-style management of the crisis is taking a toll on economic liberty and democratic freedom, threatening institutional trust and credibility. In a recent article that appeared in *Foreign Affairs* titled "India's Stalled Rise: How The State Has Stifled Growth," Arvind Subramanian and Josh Felman illuminate that "in June 2021, the central bank consumer confidence index fell to a record low, with seventy-five percent of those surveyed saying they believed

that economic conditions had deteriorated, the worst assessment in the history of the survey" (2022: 142). Moreover, they claim that "many Indians are deeply ambivalent about the private sector—and capitalism generally." This is partly due to the fact that "India's private sector still bears the stigma of having been midwifed under the license raj, an era in which corruption was pervasive" (147). More free-market–leaning neoliberals assert that Modi's industrial policy, which gives preferential government treatment and financial support to select groups of industries and specific firms, only serves to reinforce this stigma.

NEOLIBERALISM REIMAGINED: "NEOLIBERALISM IS DEAD! LONG LIVE NEOLIBERALISM"

With the growing popularity of Modi's authoritarian ethos, many have begun to question whether the liberal market model will survive in the long run. We believe, however, that rumors of neoliberalism's demise have been greatly exaggerated. India's neoliberal model will continue to evolve, assuming new shapes in order to adapt to an ever-changing global environment. What form it will assume next is not entirely clear. Despite Modi's attempts to impose greater government controls on its private economy, India's business community, which had been emboldened under nearly three decades of neoliberal political regimes, has continued to flourish. India's largest corporations, such as the Tata Group and largest banks, have not only survived Modi's demonetization scheme but continued to boast substantial profits. Indeed, over twenty Indian banks remain prominently featured on the 2019 *Forbes* Global 2000 list.

The country's invigorated private entrepreneurial class is dramatically reshaping "a new India." In the second year into the pandemic, billions of dollars in investment capital have been flowing into India's surging stock market. Subramanian and Felman bring out that venture capitalists have been pouring new investment capital into India's energetic start-up sector. To date, nearly seventy unicorn start-ups have emerged in areas ranging from cloud computing and education to entertainment and finance (Subramanian & Felman, 2022). Comprised of many young and innovative-minded millennials, this new entrepreneurial class appears to embrace a free-market ethos. Given the fact that much of their success is driven by individual initiative and personal talent rather than government support and favoritism, this is not surprising.

India's sense of "hyper-individualism" is perhaps one of the reasons (among many) why Nehru's collectivist-focused planning model failed so miserably. The landscape is wide open for this new generation of entrepreneurs to write the next chapter in India's neoliberal narrative. But what form of neoliberalism will emerge? This is far from clear. However, there are some trends worth exploring that might offer some clues. We are seeing some signs to indicate a resurgence of a more market-oriented expression of neoliberalism that is tempered by millennial values

emphasizing social justice, employee empowerment, corporate responsibility, and environmental sustainability. If these values continue to gain traction in India's economic and political system, we could see the rise of a new economic model that might involve "neoliberalism reimagined." Rather than being imposed on society by the state from the top down, this next expression may be occurring organically as individuals find innovative ways to create new industries from the bottom up. Highly suspicious of government, millennials characteristically preach on the virtues of individual freedom and expression. India's young entrepreneurs appear to share these cosmopolitan values.

According to Subramanian and Felman, if India can get through the pandemic, it may have a "chance to reboot" its economy (2022: 149). India's resurgence, however, will depend upon boosting private-sector productivity, especially in the manufacturing and software sectors. Subramanian and Felman further bring out that "India's GDP has already regained its pre-pandemic level and the International Monetary Fund forecasts it will grow by 8.5 percent in 2022, about three percentage points more than China" (2022: 149). India's economy is more "institutionally fit" than China's to support massive private-sector growth. China, they argue, "is an increasingly authoritarian country and has begun to undermine private-sector entrepreneurship and innovation through sometimes punitive state intervention" (2022: 149). While India's current leadership shares some of these authoritarian characteristics, its liberal constitutional framework and social culture are generally much more sympathetic to private entrepreneurial development.

In several important aspects, India's private firms have a potential advantage over their competitors. India's labor force is filled with millions of young, talented, English-speaking college graduates. Chinese firms operate on a business model that tends to narrowly focus on producing goods and delivering services that are cheap and fast, frequently ignoring quality as well as the concerns and needs of employees. In order to compete with China, some of India's leading firms have been undergoing a subtle, but potent "quality-based" transformation over the last two decades. Refocusing on quality involves "going back to the drawing board" and revising their entire business model in line with a "systems" management approach. Inspired by the ideas of management guru W. Edwards Deming, whose systems approach is famously associated with the total quality management (TQM)–based success of Toyota, this relatively small (but growing) group of business leaders have adopted an enlightened organizational mission. For these individuals, quality involves designing people-building strategies directly into manufacturing and service processes throughout the entire system. According to this view, quality involves reducing redundancies and waste throughout the system, resulting in higher productivity and greater profits. And according to Deming, the greatest waste is "the failure to use the ability of people . . . to learn about their frustrations and about their contributions that they are eager to make" (1982: 53) Deming's quality-based philosophy rests in the value-added development of

people through ongoing training and education with an eye toward continual improvement. Under this radically distinct business model, a leader is a coach, not a judge, whose main function is to encourage and support others in the organization to excel and take pride in what they do. For example, when leaders "eliminate fear" in their organizations by removing blame for failure, employees feel empowered to take risks and contribute to innovation. "Recognizing businesses worldwide for excellence in applying the principles of Total Quality Management," the Deming Prize was first awarded in 1951 by the Japanese Union of Scientists and Engineers (JUSE). Over the last two decades, an increasing number of Deming Grand Prizes have been awarded to Indian firms, including The Sanden Corporation, Tata Steel Limited, Rane (Madras) Limited, Lucas-TVS Limited, Rane Brake Lining Limited, and Mahindra and Mahindra Ltd., among others. The success of the business logic that has been adopted by these firms is beginning to find its way into the strategic operations of other organizations across India. One has reason to be cautiously optimistic. But such optimism needs to be balanced against sobering present reality. India's quality movement is in its infancy and has a long way to go before it reaches the standards of quality practiced by the Japanese or before it is widely accepted among industry leaders.

OUTLOOK

Of course, no one can predict the future. I have offered some insights in the latter part of this chapter as to what form neoliberalism may assume in its next evolution. Admittedly my remarks are highly optimistic, perhaps overly so. That said, there are many developments that one can point to when offering an alternative, less than cheerful, outlook for India's future. As India proceeds down its current neoliberal path, millions continue to struggle to meet their daily needs. The country's record on political corruption, while improving, is still unacceptable, and its bureaucratic system is in dire need of fundamental reform. Moreover, the nation remains deeply divided along religious and caste lines, and civil strife is a daily reality.

As we have seen in this chapter, Modi's command-and-control leadership tactics appear to have placed Indian democracy in peril. Some of Modi's critics argue that his authoritarian inclinations are comparable to those of Russian strongman Vladimir Putin. Critics cite Modi's refusal to harshly condemn Putin's 2022 invasion of Ukraine in line with the leaders of other democratic nations. Modi's warm relationship with Putin during this tumultuous time has less to do with political ideology or personal affinity that the two leaders may share and more to do with political realism. As Putin becomes increasingly isolated by the West, he has sought to strengthen his strategic ties with the Indian government. In addition, China's expanding military and economic influence in the Indian Ocean poses a mutual threat to the security of both India and Russia. The refusal of the United

States and its allies to take a strong stand against Beijing's aggressive posture in Asia and beyond, coupled with America's historic (and China's current) support for Pakistan, has resulted in tighter relations between Moscow and New Delhi.

Despite these developments, there is reason to hope that Indian democracy can endure. After all, India's constitutional regime is conceptually planted in democratic pluralist principles. Indeed, history offers an example of the resilience of democracy In India. In the 1970s Indira Gandhi's state of emergency placed "Indian democracy in crisis" (Roy, 1976), and her nationalization scheme crippled private industry. In the decades that followed, however, Indian democracy not only survived, but its elected leaders gradually adopted new ways of thinking that enabled the private sector to begin to blossom.

To be sure, India's ongoing experiment with market capitalism has been arduous and difficult. Indeed, it is often incoherent and disjointed. That said, one must keep in mind that India's market economy is relatively young and still underdeveloped. As the market model continues to evolve, one hopes that India's leaders will create a political environment that will unleash the country's enormous economic potential by empowering individuals across the social spectrum to utilize their latent talents and skills to create new personal wealth. But it will not be easy, and it will not be realized overnight. India's current model championed by Modi does not appear to be the solution to India's severe economic inequality. If India's economy is to flourish and the lives of the masses are to improve dramatically, its leaders must adopt a radically different kind of thinking. This transformation must originate from outside the country's "traditional" and often rigid and slow-to-adapt political and social system. This is because, as W. Edwards Deming famously noted, "a system cannot understand itself"; therefore it cannot change itself—it "requires a view from outside" (1994: 92). In India's case, change for the better will require a generational revolution—and this may be what we are witnessing in some of the developments that I have portrayed as "neoliberalism reimagined." Given India's complex political and economic history, anything is possible, but nothing is assured. What is clear, however, is that India's evolving experiment with neoliberalism will continue in one form or another.

NOTES

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1. The application of Denzau and North's (1993) Shared Mental Model framework is used to help us explain and illustrate the point that encompassing paradigms, such as neoliberalism, often involve

core ideational elements that may be broadly shared across contexts while simultaneously expressing distinct manifestations. That said, our purpose here is neither to "test" nor to introduce novel contributions to the shared mental models literature. For a more rigorous conceptual analysis of shared mental models and their concrete application, please see Battersby & Roy (2017) and Roy & Denzau (2020).

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12

The Explosion of Globalism and the Advent of the Third Nomos of the Earth

Walter D. Mignolo

ABSTRACT

We on the planet are experiencing a change of era, no longer an era of changes. In the era of changes (1500–2000) or the era of the Westernization of the world, changes were linear and within the frame of the colonial matrix of power. The concepts of newness, evolution, development, transition, and postmodernity are concepts singling out the changes in a linear, universal time. The change of era cannot be understood as a transition in the linear time of Western modernity but as an explosion and the reconstitutions of planetary cultural times. That explosion marks the advent of the third nomos of the Earth and the dispute for control of the colonial matrix of power by states not grounded in Western political theory and beyond the scope of international relations after the Treaty of Westphalia (1648). Russia's 2022 special operation in Ukraine, responding to NATO's provocations, with the collaboration of Ukrainian government, to "contain" Russia, is a signpost of the change of era and the advent of the multipolar world order that is tantamount with the advent of the third nomos of the Earth. The second nomos, the Carl Schmitt narrative, was tantamount with the Westernization of the world and the colonial matrix of power.

KEYWORDS

change of era, colonial matrix of power, globalism, multipolarity, third nomos of the Earth

> Sharjah is historic and present, social, natural, and political. It is a place that encourages thinking and negotiating with others. My natural response to its dynamism is to produce a Biennial which asks questions through art, and creates a dialogue that liberates us from Eurocentrism, Globalism, and other relevant -isms. (Yuko Hasegawa, at Sharjah Art Foundation, 2011)

> The idea of totality in general is today questioned and denied in Europe, not only by the perennial empiricists, but also by an entire intellectual

> community that calls itself postmodernist. In fact, in Europe, the idea of totality is a product of colonial/modernity [. . .]. Moreover, such ideas have been associated with undesirable political practices, behind a dream of the total rationalization of society. It is not necessary, however, to reject the whole idea of totality in order to divest oneself of the ideas and images with which it was elaborated within European colonial/modernity. What is to be done is something very different: to liberate the production of knowledge, reflection, and communication from the pitfalls of European rationality/modernity. (Quijano, [1992] 2007)

2022: THE PRESENT AND PAST OF GLOBALIZATION

Although the main topic of this book is globalization in the past thirty years and the outlook towards the future, I will address it since 1500. I will use the expression *global order* as a synonym. *Global order* and *globalization* are nominative expressions referring to something that seems to be happening someplace and human agencies (actors, institutions, languages) that intervene into something already made. The expressions *globalization* and *global order* prevent us from asking questions about who made and regulates it, who interprets and explains it, who changes or preserves it, why and what for. These are questions I will address to understand *globalism*, the global designs behind the world order.[1] Hence, each time I say "globalization," I mean the global interstate order, piercing through the surface looking into the puppeteers hidden behind the drama that moves the puppet. The editor's statement that motivates the publication of this book enumerates some elements of the global disorder and present illness. I assume that several essays will address them in detail. I will focus on the big picture of which the present is the chapter in which the contributors to this book are living and enduring. I close with speculations of what could be expected for the present and the futures (in plural), which depends on what is done and not done now.

My narrative of globalization starts in 1500. My perspective has been molded, however, by my experience of the Third World while attending the university in Argentina between 1961 and 1968. I began to understand "globalization" when I became aware of the meaning of the railroad installed by the British in Argentina at the end of the nineteenth century. One of the railroad lines crossed and divided the town where I was born and grew up in two. The early experience that molded my sensorium was later on rationalized, many years later, with the guidance of Peruvian sociologist, thinker, and activist Anibal Quijano, whom I met personally around 1995, after reading his ground-breaking short essay "Coloniality and Modernity/Rationality," which was published in 1992 and translated in 2007 (Quijano, [1992] 2007). In 2000 Quijano published another ground-breaking essay looking at globalization from the perspective of colonial modernity that he had introduced in 1992. In this essay, titled "Coloniality of Power, Eurocentrism and Social Classification," written in 2000, he stated:

> What is termed globalization is the culmination of a process that began with the constitution of America and colonial/modern Eurocentered capitalism as a new global power. One of the fundamental axes of this model of power is the social classification of the world population around the idea of race, a mental construction that expresses the basic experience of colonial domination and pervades the more important dimensions of global power, including its specific rationality: Eurocentrism. The racial axis has a colonial origin and character, but it has proven to be more durable than the colonialism in whose matrix it was established. (Quijano, [2000] 2008: 186)

Although the coloniality of power and the colonial matrix of power are the bases of my argument, I will consider Carl Schmitt's concerns with the situation in Europe after World War II and his understanding of *nomos of the Earth*, and particularly the *second nomos of the Earth*.[2] I will look at it in parallel with Quijano's coloniality of power and the colonial matrix of power. Schmitt calls *nomos* any territorial organization that presupposes some agency appropriating, dividing, organizing, and managing the Earth. In that regard, Schmitt states there always has been a nomos of the Earth since our human ancestors began to control and manage territories and to build complex organizations today called civilizations. The distinction of the second nomos is that for the first time in the history of the human species a civilization created the conditions to control and manage the entire planet. Schmitt locates the historical formation and foundation of the second nomos in the sixteenth century. The decisive event was, in his terminology, the European discovery of America. It motivated the European invention of international law, which Schmitt calls *Jus Publicum Europaeum*, and the global linear thinking that propelled the designs to appropriate, divide, and distribute the Earth. The division of the Earth into *Indias Occidentales* and *Indias Orientales*, in 1594 and 1529 respectively, "possessed" by the Spanish and Portuguese monarchies with the benediction of the Papacy, was the foundational instance of the second nomos (Schmitt, 1962).

The turning point of the sixteenth century in the Atlantic was the "colonial revolution" and the invasion that constituted the European idea of modernity, simultaneously destituting the people, languages, memories, and institutions. It involved the First Nations of the continent, noninvited Europeans, and soon the transportation of captive Africans turned into slaves. Those were foundational events, in deeds and words, of globalization. After experiencing the legacies of the European invasions of the Americas and of the Third World conditions of South America and the Caribbean, Quijano perceived that what for Schmitt was appropriation, division, and distribution was, above all, the foundational events of the European narrative of modernity that legitimized and activated coloniality. Consequently, when Quijano states that globalization has a five-hundred-year history sustained by salvationist discourses, the rhetoric of modernity, and the implementation of the logic of coloniality, he is offering a decolonial narrative of the appropriation, dispossession, division, and distribution of the Earth and its land, as well as a decolonial narrative of the exploitation of labor and the radical

transformation of the subjectivity of all parties involved: First Nations, Europeans, and Africans. It follows that globalization has its initial moments in deeds and words in the discovery/invention of the continents that Europeans called America. That is why Quijano asserted that, with the European invention of America, the Eurocentric control and management of capital and meaning (all the narratives, verbal and visual, legitimizing the invasion) was tantamount to the constitution of the Eurocentric global power: the coloniality of power. In that constitution, the mental construction of the idea of "race," which activated the logic of classification and ranking of people and regions, was "the most important dimension of global power, including its specific rationality: Eurocentrism" (Quijano, [2000] 2008: 186).

The colonial revolution that created the second nomos of the Earth and the coloniality of power / colonial matrix of power initiated a long process of Westernization of the planet, of which globalization is one euphemism. *Indias Occidentales* and *Indias Orientales* were two Western nominations that divided the planet in two halves. They mutated into the "Western Hemisphere" and "Eastern Hemisphere," and later on became Orientalism. As a result, globalization is a current chapter of the history of the will and the instruments (e.g., international law) to Westernize the Earth.[3] Consequently, the simultaneous constitution of Western Civilization and the destitution of the barbarians, the primitive, and the underdeveloped destituted coexisting civilizations that were expected to upgrade themselves—with the help of the intruders—in their praxis of living, sensing, thinking.

The specific Eurocentric rationality that Quijano described as Eurocentrism held two basic assumptions: the logic of either/or (constitution/destitution) and the unilinear concept of universal time. Both are the legacies of Western Christianity that mutated into secular versions in the eighteenth century. The logic of either/or (binary oppositions) naturalizes the sensorium and the rationality of the zero-sum game that dominates the global order today. The notion of unilinear time also has its origin in Christianity.[4] It goes from the creation of the world to its end (*eschaton*)—all that God created will be destroyed (2 Peter 3:10). G.W.F. Hegel narrated the secular version in his lesson on the philosophy of history and spatialized time.[5] In that version, the journey of the Spirit from its origin in ancient China to the present in Europe announces the future of history without end in sight. The future, for Hegel, was the United States and, up to that point, he was right. The spatialization of time was and continues to be fundamental know-how for the denial of coevalness in words, which substantiates the deeds (Fabian, 1983). Consequently, the territorial constitution of Western Civilization (located in the space of Western Christians) was tantamount to the march of universal time that constituted Europe's present and relegated coexisting civilizations to the past.

A summary of the colonial matrix of power from 1500 to 1989 would help to clarify the history preceding the periodization in this volume: 1989–2008, 2008–22, and 2022–40. Conceptually, the colonial matrix of power is grounded

on the universal temporalization of space sustained by the logic of either/or. This logic secured the second nomos of the Earth from 1500 to 1918 and its unipolar control and management, first by Western Christianity, and then by secular liberalism since the eighteenth century. The summary goes like this:

From 1500 to 1750, the Eurocentric frame was dominated by Christian theology and Renaissance Humanism. The universities and theological seminaries shaped and distributed knowledge managing people's subjectivity (Vilches, 2010). Mercantile capitalism extended throughout the globe from the Americas to South Asia (Britain) and Southeast Asia (the Netherlands). It altered sensorium and intellect in conflict with that of the Church and helped create the conditions for the industrial revolution and for the displacement of the monarchic states by the ethno-bourgeois nation-states. The Enlightenment flourished at this junction. Adam Smith published *The Wealth of Nation* (1776) and mapped the economy, Immanuel Kant's *The Conflict of the Faculties* (1798) remapped the Renaissance structure of knowledges, and the French Revolution (1789) provided the bases for the upcoming liberal nation-state. The Enlightenment was the continuation of the colonial revolution, without which it could not have been. International law was extended from the appropriation of land to the control of the seas (e.g., Grotius). The management of the colonial matrix of power changed hands and actors, but the colonial will to power and its salvationist rhetoric (not progress and civilization instead of spiritual salvation) continued to justify the implementation of the logic of coloniality. Globalization became full-blown.

From 1750 to 1945 England and France dominated the scene, displacing Spain and Portugal from their previous dominant positions in the management of money and meaning (Rolph-Trouillot, 2002). The Industrial Revolution secured the imperial/colonial prominence of England. The steamboat increased the numbers of people and commodities transported across continents, and the railroad opened the veins of each continent to be explored, appropriated, divided, and distributed at will, although not always without resistance and resentment—domination and exploitation always created conflicts. In this period the nation-state form of governance consolidated in Europe and the secularization of the Renaissance model of the university secured the Westernization of the planet. By the mid-nineteenth century, three major political, theological, and humanistic systems of ideas (e.g., ideologies) that originated in the sixteenth century mutated into their secular political versions: (1) the conservative position defended the Spanish right to wage war against the barbarians, (2) the progressive position defended the "Indians" promoting instead peaceful conversion, and (3) the theological-legal position recognized the right of the "Indians" to

their land but declared them incapable of its administration. The first mutated into secular conservatism, the second into secular socialism, and the third into secular liberalism (Cortés, 1851).[6] The Russian Revolution (1917–23) materialized socialism; the Alt-Right in the United States and Europe is not a new phenomenon: their ancestors go back to the sixteenth century. These three trajectories guided European global expansion until World War II. And European liberalism mutated into U.S. neoliberalism, whose seeds were planted in the late 1940s and '50s (Metcalf, 2017).

From 1945 to 1989 a series of events altered and metamorphosed the structure of the colonial matrix as it was established in its previous iterations (1500–1945). One of them was the United States becoming the major player in the continuity of Westernization and of safeguarding the global order (Hudson, 2003).[7] The rhetoric of modernity mutated from demanding progress and the civilizing of the barbarians, to promoting their development and modernization. This change in the rhetoric of Western modernity has enormous implications. While the former maintained a balance between the economy (progress) and the larger sphere of culture (civilizing and educating the backward), development and modernization made the economy the focus of Western saviors: to develop and modernize the underdeveloped. It was also the consolidation of coloniality without settler colonies, which had already been experienced in the Opium War. China did not endure settler coloniality, like India, but did not escape coloniality altogether. The current Western conflicts with China have much to do with this. Westerners may have forgotten, but the Chinese never will. The prominent role of the United States after World War II intensified the conflict with the Soviet Union that morphed into the Cold War.

The other event was decolonization. This was not just a drift of the colonial matrix of power but calling it into question. Decolonization confronted both liberal capitalism and state communism. The Bandung Conference of 1955 remains the signpost of the global questioning of globalization. From the trunk of the Bandung Conference, three major independent branches emerged. One was the Non-Aligned Movement (NAM), complemented in the Caribbean with the Tri-Continental Conference in Havana in 1966. There is a significant difference between the Bandung Conference and its heirs. "Race" was a basic mover. "This is the first inter-continental conference of colored people," Sukarno stated in his inaugural speech.[8] Race was displaced by ideology in the NAM, and "decolonization" was mitigated in its statement of purpose. Cuba was not exempt from racial (and sexual) blindness. The emphasis then changed to class. The NAM confrontation was not with colonization but with capitalism and communism, even though Bandung and the NAM set up a Third World standing that aimed to delink from the First and the Second Worlds. While one outgrowth from Bandung was the

NAM, the second was dewesternization. Singapore gained independence four years after the Bandung Conference and was led by Lee Kwan Yew from 1959 to 1990. In retrospect, Singapore was the seed of dewesternization. What Lee Kwan Yew rejected was not capitalism, but liberal ideology and Western attitudes. When Deng Xiaoping became the de facto leader of the People's Republic of China and pioneered "socialism with Chinese characteristics" and a "socialist market," he was in conversation with Lee Kwan Yew (2012: 1–36). From 1959 to 1990, Singapore became a prominent financial Third World center, while at the same time it kept distance from the West and encouraged the reconstitutions of Eastern principles and praxis of living (Skaria, 1994). Deng Xiaoping followed a similar path, appropriating capitalism to secure the reconstitution of the Chinese ancestral praxis of living and thinking.[9] In a nutshell, while Bandung confronted capitalism in the name of decolonization and the NAM promoted Third World nationalism, dewesternization embraced capitalism but rejected liberal and neoliberal managerial ideologies. Since then, dewesternization has continued to grow and assert itself as a present path towards the future (I will come back to this in the next section). The third outgrowth of Bandung was decoloniality, as Quijano reoriented at the end of the Cold War. The goal of decoloniality was to delink from the epistemological principles, the structure and content of knowledges and knowing that held the colonial matrix of power together with the nation-state, managing all political, economic, and cultural areas of experience.

THE PRESENT (2008–2022) AND THE FUTURE OF GLOBALIZATION (2022–2040)

The Russian invasion of Ukraine is either a turning point of the emerging multipolar global order or a difficult moment in the preservation of unipolarity. Beyond the human suffering, anguish, and disruption of the everyday life of the population who experience invasion and disruption (Iraq, Syria), the confrontation between unipolar globalism and global multipolarity is a confrontation for either the preservation of the privileges generated by the second nomos of the Earth or an opening toward the third nomos of the Earth (Turse, 2022). However, the march towards the third nomos is limited neither to appropriation, division, and distribution of the land nor to the political, economic, technological, and military confrontation of rewesternization and dewesternization. The forces of decolonization at large are also global. What global multipolarity would look like if the dewesternization were to advance is difficult to imagine by either the actors running international political and economic institutions or scholars and journalists interpreting what is done. Equally difficult to imagine is how unipolarity will look if rewesternization takes one step forward, having to confront the coexistence of dewesternization and decoloniality at large. But this could be advanced: the current global problems cannot be solved with the same mentality that created them. Hence, unipolar

globalism will be dissolved and submit to global multipolarity. If the reader thinks this cannot happen and is idealistic, I would ask: why should we think that getting out of the current either/or zero-sum game is impossible, and that endless war is the future forever?

Let's step back to the beginning of the twentieth century, when the neoliberal global dreams of the end of history and the homogenization of the planet encountered increasing defiance. In Schmitt's account, the second nomos was destroyed by World War I. Today, in retrospect, one has the feeling that what ended was the unipolar world order established by the second nomos. But its legacy endured and was revamped by neoliberal ideals at the end of World War II, reactivated in the '80s, and implemented globally in the '90s. The European Union was inaugurated in 1993 and the World Trade Organization was founded in January of 1995, four years after the regional North American Free Trade Agreement (NAFTA) was put into effect on January 1, 1994. The same day, the Ejército Zapatista de Liberación Nacional (EZLN) raised arms and words, mobilizing a vast population of Indigenous people in southern Mexico and Guatemala. In 1997, Subcomandante Marcos circulated an op-ed titled "The Fourth World War Has Begun" (Marcos, 1997). The signs of an emerging third nomos of the Earth were showing up.

The year 2001 is a date to remember. In September the World Trade Center's Twin Towers collapsed. We may never know who planned and executed the operation, why and with what purpose. What we do know are the consequences: the redefinition of terrorism, the justification of the just war as long as necessary, and the legitimacy of invading countries supposedly involved or supporting the terrorists. The unipolarity secured by the second nomos was redesigned. However, in 2001 China joined the WTO and, in retrospect, the seeds of dewesternization planted a few decades before in Singapore and China began to grow. In the subsequent years, the failure to build Iraq after invading and dismantling the country in 2003, compounded with the financial turmoil of 2008 which shook the global financial system, were two events fogging the neoliberal design to revamp the second nomos to homogenize the Earth under the banners of political and economic unipolarity and epistemic universality.

This sketchy account of events points towards Western (U.S., NATO, EU) loss of managerial control of the colonial matrix of power. Political/economic unipolarity and epistemic universality (Eurocentrism), two legacies of the second nomos, became harder to maintain. Decolonization during the Cold War and dewesternization brought unexpected features into the global order. The decolonial claims made at the Bandung Conference and maintained by the leaders of decolonization in Africa made it possible to think that there was a life beyond liberalism and communism: the long-lasting memories, praxis of living and thinking of the people fighting to liberate themselves from either version of Western cosmology. Deng Xiaoping announced China's politics in the two formulae "capitalism with Chinese characteristics" and "socialism with Chinese characteristics." The announcements

were taken with ironic smiles by Western commentators. They smiled because Western cosmology trains the sensorium and the intellect of its subjects to feel, think of Western binary oppositions as universal totalities. Therefore, capitalism and socialism cannot complement each other: they are irreducible to each other. But if your sensorium and your intellect are trained to feel, think, and see complementary dualities (e.g., there is no day without night, no left without right, no West without East; no North without South) and that *yin* and *yang* are two moieties of *tianxia* (all under heaven),[10] then capitalism and socialism with Chinese characteristic make sense because they are appropriated and subsumed under another cosmology. Capitalism and socialism are denaturalized, so to speak, and the zero-sum game loses its meaning. The Chinese position on Ukraine today refuses to buy into the Western zero-sum game (Tsu, 2010). This is another sign of the emerging third nomos of the Earth.

Another feature brought to light by decolonization and dewesternization, which points towards the third nomos, is the productive tension between the existing praxis of living (languages, memories, sensing, thinking) with the invading Western coloniality of power. Decoloniality and dewesternization emerged at the moment that people who experienced the disruption decided not to surrender but to reemerge. The question is not one of returning to a pristine past, but rather of bringing the past to the present, reconstituting the praxis of living temporally destituted by the promises of modernity. Dewesternization appropriates capitalism but rejects Western cosmology as well as political liberalism, neoliberalism, and Western Christianity while using Marxism at will. These are all disruptions activated by the second nomos and the Western unipolar management of the colonial matrix of power. And this is the major difference between (a) decolonization during the Cold War and (b) dewesternization and decoloniality after the Cold War. Dewesternization was not then an option. Decolonization during the Cold War questioned capitalism and communism but failed to confront the colonial matrix of power that engendered and sustained both. Since the end of the Cold War, decoloniality has called into question the coloniality of power while dewesternization disputes its control and management. Another sign of the emerging third nomos of the Earth: unipolar globalism and universal rationalism, conquered during the second nomos, have exploded.

A third path I would like to underscore, beyond the sphere of global interstate political, economic, technological, and military conflicts just outlined, is decoloniality at large. By decoloniality at large I mean the sphere that Immanuel Wallerstein described as "antisystemic movements" (Wallerstein, 2014). The differences between decoloniality at large and antisystemic movements is embedded in the difference between world-systems (Wallerstein) analysis and the colonial matrix of power (Quijano). Wallerstein continued the work of prominent French historian Fernand Braudel (1973) while Quijano started from the prominent Argentine economist Raul Prebisch who, in the 1950s, introduced the ground-breaking

distinction of center-periphery. This dynamic was invisible for Braudel and Wallerstein, who looked at the world from the North Atlantic. Prebisch, in Quijano's interpretation, underscored "the historical model for the control of labor, resources, and products that shaped the central part of the *new global model of power*, starting with America as a player in the new world-economy," without which the modern world-system "cannot be properly or completely understood" (Quijano, [2000] 2008: 180). *Race* is missing in Wallerstein's antisystemic movements.

For Quijano, unlike for Wallerstein and Braudel, "race" rather than "class" is the concept that legitimized the historical foundation of capitalism based on massive expropriation of land and the massive exploitation of labor. Hence, by decoloniality at large I mean the myriad manifestations of the political society in the public sphere that not only resist but also reexist. That is, they delink from the regulation of the colonial matrix of power. However, since the colonial matrix of power has no outside, delinking is not exiting but a commitment to carry out civil and epistemic disobedience.[11] Briefly, a wide spectrum of society has been mobilized by the current dispute for control of the colonial matrix of power in the domains of knowledge and the standards of white heteronormativity. All of these are signs the colonial matrix of power is getting out of control; the second nomos is being destroyed (to use Schmitt vocabulary), and the *t*hird nomos of the Earth is emerging.

Decoloniality and dewesternization share epistemic disobedience. Western theories of international relations, formulated on the secular idea and the nation-state form of governance (Kissinger, 2014), are called into question by de-Western and decolonial scholarship. I will close by discussing one instance of de-Western epistemic disobedience, and leave decoloniality aside for another opportunity.[12] Dewesternized, like rewesternized scholarship (Kissinger, 2014; Brzezinski, 2016; Fukuyama, 2011) on international relations, is connected to the state, while the impact of decolonial scholarship is mainly in the social sciences and the public sphere. State politics and decoloniality are strange bedfellows.

Chinese philosopher and political theorist Zhao Tingyang has argued for dewesternization of international relations in his articles, interviews, and landmark book *All under Heaven: The* Tianxia *System for a Possible World Order* (2016).[13] His argument is not proposing to replace one rational universality by another or one unipolarity for another. That would mean surrendering to the zero-sum game. *Multipolarity in the world order requires pluriversal theories as much as unipolarity in the world order requires universal theories*. Instead of assuming that the international order shall be regulated by political theories based on the Western nation-state and on Western political cosmology, Zhao dug into the past of ancient China (as much as Western theorists dug into the past of Greece and Rome), assisted by archeological and ethnohistorical research, drinking from the fountains of Chinese cosmology—*tianxia*, all under heaven. Why, Zhao asks, should Western theories of political sciences be the sole criteria for interstate relations? His question

has wider consequences. At stake is the entire domain of modern/colonial Western knowledge and its cosmological underpinnings.[14]

There is a caveat before taking the next step into Zhao's argument. In early February of 2022, Presidents Xi Jinping and Vladimir Putin signed a document titled the "Joint Statement of International Relations" and, as a result, entered a new era of international relations not defined by the West (Qingqing & Yuwei, 2022).[15] If you search for this statement, you will find articles about it in the Western media bearing titles with the clause "against the West." Decolonially read, the statement is not "against the West" but rather "pro the East."[16] Zhao's argument disobeys and delinks from Western theories and state-led praxis in words and deeds. It is not anti, but pro: towards pluriversal theories of international relations. Unavoidably, Zhao's de-Western theorizing acts out border thinking and border gnoseology, avoiding the trap of territorial thinking and Western epistemology. Similarly, the "Joint Statement" presupposes border thinking since it could not exist by itself as if Western and North Atlantic regulations of international relations did not exist.

For Zhao, the current unipolar global order is a nonworld, a disorder. The main challenge of getting off the *unworld* and engaging in *worlding* it is to extricate ourselves from the belief that the current *unworld* that satisfies the interests and decisions of the G7 is the only available option. Zhao's points display the direction of his thought:

> My reimagining of the concept of *tianxia* (*All Under Heaven*) suggests a system *of world order for and by all the world's people*. This political ideal is not some unrealizable utopia but rather an accessible *xontopia*. The concept of *tianxia* was a political starting point for China. In contrast to the Greek *polis* as the political starting point of Europe, *tianxia* as a concept indicates that *Chinese political thinking* had begun with an all-encompassing "world" rather than an exclusionary and discrete conception of sovereign "states." [. . .]
>
> Being so much more than a solution to the challenge of Huntington's thesis regarding the inevitable clashes of civilizations, *tianxia* is also an effective response to the failure of international politics with its regnant paradigm of zero-sum competitive logics obtaining among states and its woefully ineffective game rules that use only hostile strategies which are incapable of solving the world political problems." (Zhao Tingyang, 249–50, italics added)

"A world order by and for all people" doesn't mean that China should be the supreme regulator of such a world order, for that would be another version of unipolarity. Zhao is not proposing a "new" unipolar world order controlled by China instead of the West. This would be a misreading of his argument and, by implication, of the Chinese government's international politics. What Zhao proposes is a theoretical-political frame to make sense of de-Western pluriversal political philosophy and de-Western multipolarity for global interstate relations proposed by the joint statement. By definition, multipolarity cannot be unipolarly managed! The sensorium and intellect guided by *yin-yang* could not be subsumed

and reduced to the sensorium and intellect still following the "friend-enemy" logic (i.e., "you are with me or against me"). Consequently, the question of *the future in the present* (2022–40) is this: in the twenty-first century, when across the planet scholars, politicians, and journalists are experiencing the closing of unipolarity and the desperate effort to maintain its privileges, why should the global world order rely solely on unipolarity in deeds and universality in words?

Zhao calls the current *unworld* the privatization of interpretations and judgments. His arguments help intellectuals understand the current efforts of the United States, NATO, and the EU to maintain the unipolar perspective (Zhao Tingyang, 2016: 205, 208) and to contain the political, economic, and military disobedience. Zhao offers some advice on this matter: "Since Christianity conquered Greek civilization, a logic of struggle against heresy has taken shape in the West; with this, the West has come to see the world as being mired in conflictual opposition and warfare" (2016: 206). The world itself, Zhao adds, "has ceased to have potential for subjective agency and has now become a mere object. Because of this, all the myriad things of the world and all its diverse peoples have lost their unique histories. Any history and culture existing prior to becoming part of this totalizing 'Christian' civilization is viewed as forsaken and having hitherto existed only in a meaningless, existential absurdity" (2016: 208).[17] Globalism is another word and a secular version of the Western totalizing conception of the cosmos and human history and its implementation to pull everyone under the one big umbrella.

The Advent of the Third Nomos of the Earth

At stake is the global order rather than globalization. I have argued that globalization is not a network of events and processes happening as *globalization*, but that events and processes are not *globalization* until they are named, described, analyzed, and explained as such. For that reason, I focused on *globalism*, the global designs that the nominative globalization hides and that allows us to understand how *globalization* is made. Once a nominative has been accepted, it becomes an anchor for a set of conversations that connect statemen, scholars, journalists, artists, curators, and society at large. The same could be said for all nominatives and descriptors that anchor sustained domains of conversations such as the cosmos of theoretical physics, the divinity of religions, and the art of museums. Conversations coordinate domains of interactions, harmonic and conflicting, to the point that we forget to ask when and where the conversation started, who put it in motion, why and what for. The global order is being shaped up by the advent of the third nomos of the Earth in the coexistence of dewesternization, rewesternization, and decoloniality.

My first epigraph underscores cultural dewesternization (beyond the sphere and coexisting with states' political decision-making), featuring prominent Japanese curator Yuko Hasegawa, whose work has been questioning the assumed epistemic Eurocentrism and globalism. The second epigraph comes from a prominent

Peruvian sociologist who addresses Eurocentrism and the totality of knowledge. Both statements make a similar claim: to liberate ourselves (Hasegawa) and divest ourselves (Quijano) from Eurocentrism, globalism, and similar -isms. They are similar but irreducible to each other. These gestures move both dewesternization in state politics and in the politics of academic scholarship (Zhao), as well as in curatorial praxis in museums and biennials. Similarly, decoloniality activates the public sphere and the political society mobilizing its/our potential to delink from futures grounded on zero-sum games in any area of experience. The advent of the third nomos of the Earth implies the competition for the appropriation, division, and distribution of the Earth in Schmitt's conceptualization, as well as the increasing political claims of Indigenous organization to get back the stolen land. Parallel to the domains where politico-economic conflicts are driven by dewesternization and rewesternization, there is the domain of the political society in the public sphere where cultural dewesternization and decoloniality at large are moved by similar concerns: exiting the failures of modernization, as Yuko Hasegawa titled one of her recent exhibits (Hasegawa, 2016). These are some of the signs pointing towards the emerging third nomos of the Earth.

NOTES

1. *Globalism* was a felicitous call made by Manfred B. Steger (Steger, 2005). I paired it with *global designs* (Mignolo, 2003).

2. Schmitt expressed his concerns on the European situation in a lecture he delivered in the Spain ruled by Francisco Franco in 1962. Lecture note.

3. This book was written just before the collapse of the Soviet Union (Latouche, 1989).

4. Carl Schmitt pointed out the continuity and complicity between Western Christianity and Secularism in *Theologie Politique* (Schmitt, [1922] 1988: 168).

5. In the eighteenth century the secularization of linear time went from the primitive to civilized man (Mignolo, 2011).

6. Immanuel Wallerstein identified three system of ideas holding the modern world-system: conservatism, liberalism, and socialism.

7. A few years before, Juan Bosch, former president of the Dominican Republic, elected democratically and deposed by a coup with the support of the United States, published a small book, *Pentagonism: A Substitute for Imperialism* (Bosch, 1969).

8. Opening address given by Sukarno, Bandung, April 18, 1955, www.cvce.eu/en/obj/opening_address_given_by_sukarno_bandung_18_april_1955-en-88d3f71c-c9f9-415a-b397-b27b8581a4f5.html.

9. "Prime Minister Meets the Press," National Archives of Singapore, August 9, 1965, www.nas.gov.sg/archivesonline/audiovisual_records/record-details/4887eb16-1164-11e3-83d5-0050568939ad.

10. Indigenous cosmologies in the Americas are similar to Chinese's cosmology in that they all refuse binary opposition fixity. Complementarity duality and example: Kapenawa & Albert (2013).

11. From Henry David Thoreau to Mohandas Gandhi, from the Zapatistas to the *Jinology* of Rojava Women, from the Peasant Way to Rhodes Must Fall and Black Lives Matter, and more, epistemic disobedience is moved by racial and sexual discrimination. The aims are not just to resist, but to reexist.

12. The bibliography is vast at his point. For an overview, see Krishna (2012).

13. See also Yan (2013) and Zhang (2012). The latter includes a conversation of the author with Francis Fukuyama.

14. On pluriversality, decoloniality, and dewesternization, see Mignolo (2018a, 2018b).

15. The complete agreement was published by the Russian presidential office, February 4, 2022, http://en.kremlin.ru/supplement/5770.

16. Singaporean diplomat and historian Kishore Mahbubani has made some interesting points from the Eastern experiential perspective. See "The New Asian Hemisphere: The Irresistible Shift of Global Power to the East" (2008). His talk on YouTube made the point straightforwardly: www.youtube .com/watch?v=2zEfpsxw2OI

17. Japanese curator Yuko Hasegawa curated the Sharjah Biennial 11 in 2013. She titled it "Towards a New Cultural Cartography." In her curatorial statement she pointed out that the biennial intended to depart from Westernism, Eurocentrism, and equivalent "isms." More recently, 2016, she curated an exhibition in Germany titled "The New Sensorium: Exiting the Failures of Modernization."

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13

Is It All a Dream?

Global Movement and the Gossamer of "Globalization"

Lisa Uperesa

ABSTRACT
Sedimented orientations to the concept of globalization today often rest on a technocratic triumphalism—"time-space compression"—made possible by emerging technologies, "flows" of various kinds transforming "-scapes" they transit and shape, capital straining toward unfettered freedom stalking new markets and shaping governance possibilities, the movement of humanity facilitated by infrastructure, and cities that serve as pulsating nodes of a global order. Not only does this triumphalist vision exclude vast swathes of the globe, it draws on a set of ideologies and ontologies from the West to represent global pasts, presents, and futures to all. These exclusions and focal points are not just coincidental, but mutually constituting. With attention to two topics often situated within globalization imaginaries—mobility discourses and sport ideologies—this chapter engages Pacific worldviews of movement to probe the limits of globalization as a conceptual framework. Focusing on strands of what becomes obscured as global movement, it suggests that adopting a kaleidoscopic approach attentive to historical contingency, transnational connections, place, and competing ontologies helps us to understand better the dynamics of our time.

KEYWORDS
indigeneity, mobility, Pacific, sport, transnationalism

Sedimented orientations to the concept of globalization today often rest on a technocratic triumphalism—"time-space compression"—made possible by emerging technologies, "flows" of various kinds transforming "-scapes" they transit and shape, capital straining toward unfettered freedom stalking new markets and shaping governance possibilities, the movement of humanity facilitated

by infrastructure, and cities that serve as pulsating nodes of a global order. While some technology and business sectors wholeheartedly support this framing, even the critical insights provided by scholars to illuminate the architecture and dynamics of connection get folded into a view of globalization as teleology—with an inevitable, self-sustaining, and increasingly abstracted power (see Appadurai, 1986, 1990; Harvey, 1989, 1990; Sassen, 2002, 2016 for example). Toby Miller et al. argue that "globalization is a knowledge effect with definite impacts on intellectual, economic, social, and governmental practice" (2001, 8). In tracing the emergence of globalization as a core concept, Paul James and Manfred B. Steger describe it as being encoded with progressively condensed meanings as it "contributed to the articulations of the emerging global imaginary in new ideological keys that corresponded to the thickening of public awareness of the world as an interconnected whole" (2014: 423; see also Steger & James, 2019). What has become represented as a universalized vision excludes vast swathes of the globe and draws on a set of ideologies and ontologies from the West to represent global pasts, presents, and futures to all. These exclusions and areas of focus are not just coincidental, but mutually constituting.

While a globalization frame may be useful for capturing aspects of large-scale connections seeded and enabled by technological shifts, we still need better insight into the articulations and disjunctures between what we understand to be "local" and "global," or perhaps to better understand the utility (and limits) of conceptualizing them in this way. Among scholars the awareness of the local as part of larger systems, whether state, regional, national, or international, is well established, with few places in the world unaffected by the shifts that have happened over the past several decades. When we think of "local," it is not just an exercise in rhetorical provincializing, but encompasses place-based, historical, and contingent dynamics that shape everyday life, and this demands attention to specificity. In contrast, we often think of the "global" as amorphous connections powered elsewhere by others, as filaments woven in the ether of media or materialized in commodity chains and seasonal labor schemes. Meanwhile, transnational flows of labor are conditioned by the rise of nation-states and border politics, and disciplined by national policies, transnational capital, and international governance bodies. The COVID-19 disruptions fractured the view of globalization as a powerful self-sustaining system as they revealed worldwide connections to be highly dependent on lines in the networks, and these in turn are impacted by conditions on the ground that sustain effective nodal connections. This raises the question of whether we should be writing against "globalization" and toward a kaleidoscopic approach toward examining our world today.

Attentive to two topics often situated within globalization imaginaries—mobility discourses and sport ideologies—this chapter asks: What is useful and what is left out of a globalization frame? What might we gain from shifting the lenses so often used in power centers of the Western world? Drawing from the

Indigenous and diasporic Pacific, ontologies of global movement are challenged by Indigenous frameworks and articulations, showing how globalization as an imaginary not only obscures but erases. Secondly, attending to mythmaking and global sport, we see more clearly how fantasy not only informs reality but begins to bend it through people's everyday choices. Taking concrete examples from the sport world—often either conceptualized as hyperlocal or grandiosely global in scope—we can instead ask, how might attending to transnational connections as a methodological choice and adopting a kaleidoscopic sensibility help us to better understand the dynamics through which what is often seen as the local and global shape each other? Focusing on strands of what becomes obscured as "global movement" helps us to understand better the dynamics of our time and provides a different approach to our emerging futures.

MOBILITY DISCOURSES AND PACIFIC VISIONS OF MOVEMENT

In his landmark article "Our Sea of Islands," esteemed scholar Epeli Ha'uofa crafted a new vision of the Pacific that turned away from bureaucratic discourses of small islands, limited resources, and dependency to reckon with the fullness of the world of Oceania, thereby effecting a significant paradigm shift that continues to this day. Reflecting on the ancestors, he noted: "Theirs was a large world in which peoples and cultures moved and mingled, unhindered by boundaries of the kind erected much later by imperial powers. From one island to another they sailed to trade and to marry, thereby expanding social networks for greater flows of wealth. They travelled to visit relatives in a wide variety of natural and cultural surroundings, to quench their thirst for adventure, and even to fight and dominate" (1994: 154–55). He went on to describe networks of islands connected by circulation of people and wealth, from which they ventured far afield to the western, eastern, and southern areas of the Pacific. These island conglomerations are evident in oral histories, genealogies, and exchange of cultural forms like dance.

Speaking of the movements of Pacific peoples in the post–World War II era and beyond, Hau'ofa wrote, "The new economic reality made nonsense of artificial boundaries, enabling people to shake off their confinement" that had been imposed by imperial borders. He explained:

> They have since moved, by the tens of thousands, doing what their ancestors did in earlier times: enlarging their world, as they go, on a scale not possible before. Everywhere they go—to Australia, New Zealand, Hawai'i, the mainland United States, Canada, Europe, and elsewhere—they strike roots in new resource areas, securing employment and overseas family property, expanding kinship networks through which they circulate themselves, their relatives, their material goods, and their

> stories all across their ocean, and the ocean is theirs because it has always been their home. (1994: 155)

In the effort to understand this new volume and directionality of movement, Hau'ofa implored us to widen our lines of sight: "We cannot see these processes clearly if we confine our attention to things within national boundaries and to events at the upper levels of political economies and regional and international diplomacy. Only when we focus on what ordinary people are actually doing, rather than on what they should be doing, can we see the broader picture of reality" (1994: 156–57). In his wider view of shifting histories of mobility in Oceania, he makes the point that movement closer and further abroad has always been part of everyday practice across Te Moananui-a-Kea/Kiwa/Kiva (literally, the wide ocean or Oceanic world). While twentieth-century transportation technologies and shifting border regimes made renewed mobilities a reality in many parts of the Pacific, contrary to common sense around migration and globalization, this movement phenomenon was not new. The Pacific was already characterized by circuits connecting Pacific Island peoples within and beyond their archipelagoes to each other shaped by deeply ingrained travel tendencies and practices (T.D.I. Salesa, 2003).

Peoples of the Pacific have been enacting global mobility, in the sense of cultivating wide-ranging networks and movement far beyond the horizon for settlement and trade for centuries. The intrepid travel practice and expertise was captured in names such as "The Navigator Islands" given by Western explorers. In "The Pacific in Indigenous Time," Damon Salesa charts some of this early movement, drawing on archaeological evidence and oral histories, from the settlement of Austronesia, near and far Oceania, to the later settlement of Ancestral Polynesia or Hawaiki, and parts of what we often call Micronesia. Through the expansion of the Lapita cultural complex and other complementary migrations, Oceanic worlds were expanded (see also Irwin, 1992; Kirch & Green, 2001). "The wide and continuing distribution of objects throughout the Lapita sphere demonstrates ongoing networks or systems of exchange that are ancestral" (D. Salesa, 2014: 35). Other networks or systems of connection, movement, and exchange have been well documented (the Kula system of exchange in Melanesia, for example). Yet while these kinds of far-flung regional connections through specific circuits and nodes are long-standing, they follow particular routes both up until the sixteenth century and with the arrival of newcomers after. The story of the colonial era, as part of a larger worldwide movement of nations, states, and companies in search of lands and resources for extraction, is nonetheless one that was "locally dramatic, but regionally prolonged and haphazard" in the Pacific (D. Salesa, 2014: 36). Attention to these histories reveals a global sensibility in movement far afield but also the importance of specificity and continencies in the way movement unfolds over time.

Ontologies of Pacific Movement

One of the largest debates in mid- to late-twentieth-century anthropology contested a seemingly simple question: did Pacific Island peoples voyage deliberately across the vast expanse of the moana or did they drift by accident? Countless reams of paper were inked in dedication to that scholarly debate, held over the heads of practitioners and in ways that rendered oral histories and even material culture suspect. Only when the scaled model could be built and the navigation replicated with Indigenous Pacific knowledges of maritime movement, of swells and currents and seas and landfalls, would the critics—those for whom it seemed the very idea of Indigenous peoples deliberately testing and refining and building knowledge to navigate the world they inhabited was too unbelievable to be true—be finally silenced. The renaissance of Indigenous Pacific voyaging and the revitalization of Polynesian wayfinding built upon the knowledge of Micronesian master navigators to reclaim not only history but practice, shown in the Hōkūle'a and Hikianalia voyages. In so doing, modern voyagers enacted a global mobility shaped by Indigenous ontologies that was both contemporary and part of a long and storied tradition (see Finney et al., 1995, or Thompson, 2016).

The debate itself over whether early voyaging was accidental or deliberate is emblematic of the kinds of impulses that are alternatively buried within or shouted from the rooftops when globalization imaginaries are mobilized. In these imaginaries agency is exercised by capital, supported by governance structures and policies, driving transformative dynamics that have reshaped our lifeworlds. And while the impetus of capital is perennially tied to mobilizing labor flows, it does so in ways that constrict choice and attempt to render laborers docile and disempowered. In this context the "rational person" of economic theory responding to structural opportunities or difficulties shapes prevalent understandings of how people move and why, and that rational person's world is always already conditioned by an imaginary of Western market-based capitalism. There is little room for culture and ontology that departs from the normatively unmarked except to act as examples of failure: anachronistic social regimes that must be overcome to enable further infiltration of capital and capitalism. Indigenous ontologies are silenced in globalization theory except as particular responses to more powerful structures of capital and globalization. Yet ethnographic work with transnational communities shows not just response to structural determinism but rather coconstituted practice where personal and community agency not only meets, shapes, and is shaped by larger structures, but in many cases is driven by concerns and sensibilities that are not wholly part of or governed by these structures. Indigenous ontologies are a central element of Oceanic mobility—these are place-based in many ways as they arise out of conceptions of one's place in the world tied to contextual relations and worldviews, and manifest in cultural sensibilities around movement. What

globalization explicitly or implicitly purports to obliterate (specific expressions tied to place and space) is actually key to understanding these movements.

Working almost contemporaneously with Ha'uofa, Cathy Small's ethnography of Tongan movement in the 1990s traces the story of an extended family from a village in Tonga to California's San Francisco Bay Area. Through her time with the family, she illuminates important shifts in their movement, including adapting gender norms and practices, intergenerational tensions and challenges, and changing cultural obligations in diaspora. But things were not only changing abroad; conditions at home in Tongan villages were already shifting with regard to access to land, economic pressures and consumption patterns, and rhythms of labor and everyday life. Understanding their transnational movement required attention to "the *differential* in both social and economic mobility" ([1997] 2011: 192). "The differential ensures that it is only in returning 'home'—in transnational visits, investment retirement, and remittances—that the real promise of the migration process can be fulfilled" (192). But the drives for migration did not sit neatly within American scripts of migration to the land of opportunity, leaving the old world behind. Tongans were migrating in part for fulfilling *kavenga* or to meet *fatongia* (cultural obligations or shared responsibilities), to serve their families in Tongan ways amidst shifting economic prospects and expectations.

Twenty years later, Tēvita O. Kaʻili's *Marking Indigeneity* (2017) focused on the sensibilities around *tā* and *vā*, Tongan philosophical notions of time and space, as a prism through which to understand efforts to organize daily life, to meet normative workforce expectations, and to fulfill cultural obligations among Tongan migrant communities in Maui. The manipulation of space and approach to time was part and parcel of negotiating Tongan cultural sensibilities and duties as they ran up against the unforgiving persistence of Western time that governed the worlds of work and school. Although Kaʻili does not address this specifically, it suggests that many were stretching themselves thin in the reckoning between Tongan *tā-vā* and the time-space of American capitalism, but persisted anyway. That they were doing their best to balance competing ontologies in these diasporic/transnational spaces pushes back on the deterministic frames of globalization as capitalist triumph. As I found in research on sport with Samoan communities at home and abroad, many Pacific peoples have become capitalist subjects but are not merely subject to capitalism—they have recourse to other ontologies that actively shape action (L. Uperesa, 2022).

These other ontologies appear elsewhere and help us to rethink the common sense of globalization frames. For example, in Sia Figiel's novel *Where We Once Belonged* (1996), she focuses on Sāmoa as the sacred center—where the village, the nation, and the world are anchored from the perspective of one whose feet are on the *fanua* or the land in Sāmoa. As her character Alofa Filiga joins her peers in a favorite pastime of counting relatives, she is showcasing Samoan views of *ʻāiga* or

ʻāigapotopoto (extended family). With the sensibility that a family that is strong is one that is large, she also weaves in the prestige of going abroad as an accomplishment that extends the reach of the family. This appears also in Sa'iliemanu Lilomaiva-Doktor's work in critical geography that shifts prior lenses of movement and migration to ones consistent with and rooted in Samoan ontologies. In this framing the *moa* is indeed the center, and conceptualized as *iʻinei*, here, as distinct from *fafo*, or the outside (2009). This perspective shift is from the bird's-eye view of globalization theory to one grounded in place; rooted but looking outward rather than disembodied and decentered. But as Cluny and La'avasa Macpherson remind us in *Warm Winds of Change* (2013), movement from this grounded place is still shaped by and negotiated amidst historical contingency and Indigenous sensibilities, and conditioned by specific pathways. (The connections abroad that they trace, and those that feature in Figiel's work, are not primarily motivated by but remain nevertheless enmeshed with the pasts and presents of New Zealand's ambitions to empire in the Pacific.)

With the examples from the Indigenous and diasporic Pacific, we can question the seemingly settled ontology of globalization as it emerges in mobility discourses. In doing so, this raises the limitations of globalization as a frame for mobility and highlights the importance of attending to specificity of movement with a kaleidoscopic view that enables agility—illuminating specific histories, power dynamics, and the legacies for the present as well as ongoing accountabilities and responsibilities for the future.

SPORT PATHWAYS AND GLOBAL IMAGINARIES

High-profile examples of sport mobility often remain at the individual level, with a focus on dramatic narratives. The breathless media coverage, whether around key figures in a given sport or backstories featured in periodic Olympic coverage, allows viewers to connect to pathways charted by the rise and fall of stars in sport. On the far end of the spectrum from the global sport imaginaries, this hyperfocus also obscures the ways that local contests are increasingly intertwined with regional, national, and international entities. In this section we chart a middle course with examples from the Pacific to highlight the interplay between specificities of pathways and place, and the force exerted by globalized sport imaginaries.

In Aotearoa, New Zealand, the remaking of the national sport through the global advertising campaigns of the multinational company and sponsor Adidas at the moment of the rugby union's professionalization in 1995 provides a particularly clear example of the way local practices are increasingly enmeshed with circuits that range far beyond the horizon (see Jackson & Hokowhitu, 2002). Rugby dominates the national sportscape, and while the success of icons like Sir Michael Jones, Fiao'o Fa'amausili, and Dr. Farah Rangikoepa Palmer are elevated in the public eye, the journey is often a long and precarious road. It is one that

is developed in the everyday on the *whenua* across the *motu*, in local clubs and schools supported by families and communities. These flaxroots efforts infuse and sustain the sportscape in place but remain connected to a larger imaginary around sport mobility and movement. That imaginary is reconstituted in every test match and tour, where *taonga* or cultural treasures like *haka* are mobilized as national symbols on the world stage.

Individualizing these journeys obscures the wider networks, contingent histories, and in many ways, cultural sensibilities and ontologies that may feed or propel them; but focusing largely on the systemic macro framework of global sport does as well. The latter discussions are useful for understanding the dynamics of international sporting bodies and wider frames of sport investment and movement in the aggregate.[1] However, the insights they yield, like those focused on the large-scale framing of global migrations, are partial (Carter, 2013). What we might abstract into a "system" of "global sport" is actually an aggregate vision of distinct and overlapping historically contingent pathways connecting what is sometimes called the Global South to the Global North, but also different localities to each other. In many cases the colonial pathways that carried sports migrants of the past are now subsumed into what we call the infrastructure of global sport, but the colonial traces live very much in the present (Grainger, 2011). In this context the global vision hides as much as or more than it illuminates, and to understand what is happening in any given area of the sport world requires attending to local and contingent connections within and across established pathways (Besnier et al., 2020).

Understanding the significance and composition of sports like rugby union and rugby league in places like Aotearoa requires insights into specific colonial histories, presents, and afterlives. Over a century after its introduction, rugby remains a national pastime in Aotearoa—folded into durable national narratives that in the nineteenth and twentieth centuries privileged gendered settler-colonial sensibilities around rugged masculinities and whiteness (Phillips, Nauright, & Chandler, 1996; Pringle, 2004). Although marginalized in early accounts, Māori have been part of the local game from its early days (Hokowhitu, 2005; Calabrò, 2016). Today Māori and Pasifika players are increasingly central to both the men's and women's game (Grainger, Falcous, & Newman, 2012).[2] For non-Māori Pacific peoples, this heavy sporting presence builds on migration histories that themselves have been enabled by colonial pathways and Indigenous sensibilities around movement. Pasifika peoples make up just over 8 percent of Aotearoa's population,[3] and are largely drawn from Pacific Island countries historically associated with New Zealand empire and those with historical linkages to the British Commonwealth.[4] Reading colonial entanglements in the Pacific present can be crucial, but the field of sport mobilities incorporates other connections, disconnections, and inequalities as well (Besnier, 2014).

At the other edge of the moana, my research on Pacific Islander participation in American football has traced the movement from areas of the Pacific like Sāmoa

and Hawaiʻi to the sport fields of the United States, facilitated by legacies and contemporary realities of U.S. empire (F.L. Uperesa, 2014b). Waves of post–World War II migration from Sāmoa came largely through the territorial status of Tutuila and Manu'a, the site of the former Naval Base Tutuila, and the statehood status of occupied Hawai'i. In the ensuing decades horizons stretched further afield and movement networks have become more complex, transforming the Polynesian Pipeline of the past into the Polynesian Network of the present, but the larger story is incomprehensible solely as a narrative of global sport movement. While there is more freedom today than in the past, historical pathways shape present and future possibilities, and these pathways have specific contingencies rooted in place, tied to complex dynamics. At the same time, engagements with these pathways often build on and are shaped by cultural sensibilities around *tautua* or service and long-standing Indigenous orientations to mobility discussed earlier. It is in paying attention to this articulation that we understand better not only the movement of capital but the agency of those who are enacting globalization "from below" (Portes, 2000). They do so not only as passive actors buffeted by the winds of change driven by whims of elites, but as empowered agents themselves actively shaping the world around them.

Sports Imaginaries and Place

While sports migrants are empowered agents, they are also working within contexts shaped by sport imaginaries. In these imaginaries, particularly in the late twentieth century and since, mobility (geographic, economic, social) anchors the dream. Across the world globalized sport mobility often represents unfettered access to future possibilities through networks, contracts, visibility and branding, access to educational pathways, and flow-on professional opportunities. In this vision, sport fields offer a chance to change the trajectory of a life and the lives of those around them, standing as a rare opportunity to bypass existing inequities, hierarchies, and limited life chances. It is a potential escape from the harsh realities of late capitalist shifts—neoliberal disinvestment, rising inequality, and reconfiguration of sectors that once were paths to sustainable working-class and middle-class employment (Esson, 2013; Trimbur, 2013). For many Pacific Islander players, representation as athletes in popular culture and the opportunity provided by expanded investment in sport infrastructure together influence everyday choices by players and families. These shape youth views of future careers (Fitzpatrick, 2013) and the perception of sports as a "meal ticket" (McDonald & Rodriguez, 2014). Whether amassing athletic capital or navigating athletic-industrial complexes and transnational sport mobility routes (Maguire & Falcous, 2011; Runstedtler, 2018; L. Uperesa, 2022), athletes engage these imaginaries as they actively produce their own mobility (Carter, 2011).

Yet in many of these sports the probability of upward mobility through sport is far outpaced by the sense of possibility (Eitzen, 2009). In the United States,

for example, considering the journey from high school to the pros, one's overall chances are exceedingly slim: of the millions who play high school football, only 254 players are drafted to the NFL in a given year (NCAA, 2020). In this, the force of the global sporting imaginary seems to bend everyday choices even in the face of contrary realities—for every star college or professional athlete there are thousands who didn't progress, and some with distressing consequences for them or their families (Menke & Germany, 2019).

If we reject abstracted global sport mobility narratives, what does attention to specific networks anchored in place reveal? In places like Hawaiʻi, which has significant racialized economic inequalities and a large split between public and private education (Okamura, 2008), youth sport is one strategy for accessing private schooling opportunities from middle school up. While these may position student-athletes well in feeder programs for college recruiting, they are more likely to provide access to social networks and privileged educational experiences. These yield outcomes as well, even if the dots are harder to connect because of the delayed arc of outcomes that may materialize years into the future. Abstracting youth sport participation as part of a global or national system yields only partial insight, and leaves aside factors that are intensely local but shaped by widening concentric circles of context. Moreover, these local considerations are not fully captured by visions of mobility or access to capital (social, economic, or cultural). For some groups like local Japanese descendants playing barefoot football or baseball throughout the twentieth century, demonstrating cultural citizenship particularly after the bombing of Pearl Harbor was key (Franks, 2000, 2002); for others, like many Polynesian football recruits, sport became a way to represent the nation, push back on cultural racism, and acquire the means to fulfill cultural obligations like *tautua* or service to family and community (F.L. Uperesa, 2014a).

Across Te-Moananui-a-Kiwa and beyond, continued participation is also reproduced through family and community commitments to particular sports (Lakisa, Adair, & Taylor, 2014; Lakisa et al., 2019). The linking of cultural identities and homeland loyalties to representation on the field is shaped by but ultimately exceeds the frames provided by global mobility narratives driven by capitalism (Teaiwa, 2016; F.L. Uperesa, 2018, 2021; see also Guinness and Besnier, 2016). High-profile examples out of rugby league challenged conventional wisdom about chasing the big payday or the highest-ranked team, as well-placed overseas Tongan players chose to join a lesser-ranked and more poorly funded team to represent their ancestral home in the Rugby League World Cup, and in so doing fulfilled cultural sensibilities around service and fidelity. The opportunity to "Die for Tonga" on the sports field, wrote one of the players during the journey, was "unlike anything I had known in my career" (Tupou, 2017).

A closer look at sport mobility pathways in the Pacific includes structures propelled by capital at the higher end and their flow-on effects at amateur and youth levels, but players navigate routes with particular histories, contingencies,

and constraints. Here the view of "global sport" is less useful than attending to transnational connections and specificities, as well as considering worldviews of mobility that may resonate with "transnational" conceptions but are not exclusively anchored in or constrained by the nation-state. As in the earlier discussion of ontologies of Pacific movement, understanding lifeworlds and meaning-making attached to the pursuit of sport mobility also requires attention to aspects of culture and difference that may not be fully captured by Western frameworks. Understanding sport mobility, then, requires a kaleidoscopic approach wherein level, context, and scope shift into focus, always tied to place and localities.

RETHINKING GLOBAL IMAGINARIES

What is useful and what is left out of a globalization frame? What happens when the pursuit of capital as an individual or collective strategy to tap into the millenarian fantasies of globalization fails to encompass and explain whether, how, and why people move? When they flatten out important histories, contingencies, and distinctions that shape movement? What might we gain from shifting the lenses so often used in power centers of the Western world? To paraphrase the late great Biggie Smalls for provocation, is it all a dream—like filaments of gossamer woven before our eyes?

Shifting to a vantage point grounded in Pacific worldviews allows us to breach the veil, and the utility and limits of globalization become clearer. As an aggregating concept it is a useful heuristic, but for clarity toward deeper understanding we have to pay attention to contingencies, transnational connections, and competing ontologies, values, and sensibilities. These allow us to connect the local with that beyond the horizon, and together with a kaleidoscopic approach give us more tangible insights into massive shifts in lifeworlds in our time. Accepting the terms and assumptions of globalization imaginaries not only limits our sight, it maintains the force of ontologies and ideologies from the West masquerading as universal and renders all else marginal.

NOTES

1. See for example Chatzigianni (2018) and Maguire (2011).
2. I use Pasifika, Pacific peoples, and Pacific Islander as institutionally recognized terms in this essay; the first two are terms widely used in Aotearoa New Zealand and Australia, while the latter is used in the United States.
3. www.stats.govt.nz/tools/2018-census-ethnic-group-summaries/pacific-peoples.
4. This includes Tokelau, Niue, Cook Islands, Sāmoa, Fiji, and Tonga.

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14

Academic Navel-Gazing

Debating Globalization as the Planet Burns

Eve Darian-Smith

ABSTRACT

Since the 1990s, scholars in the Euro-American academy have debated and analyzed the causes and consequences of globalization. However, in the dominant and most cited literature, scholars have rarely engaged with globalization's relationship to nature and the resulting process of global warming, environmental degradation, mass extinction of biodiversity, and related climate injustices. If scholars do refer to the environment at all, it is usually in vague terms of "sustainability" needed to maintain the neoliberal logics of the status quo. This essay engages with the lack of serious attention in the literature on globalization with ecological devastation leading to our current era of imminent planetary collapse. I reflect on why this has been the case and ask what the silence on nature suggests in terms of the politics of scholarly production. I argue that scholars of globalization predominantly reflect a Eurocentric and anthropocentric perspective informed by Enlightenment thought that includes a human/nature binary and the logics of progress, modernity, and resource extractivism. This blinkered worldview both assumes the dominance of Western-based scholarship and precludes an urgent need to think more holistically about humanity's deeply entangled global futures with more-than-human worlds. I conclude that this dominant northern worldview and its embedded limitations herald the looming irrelevancy of globalization theory produced within the Euro-American academy.

KEYWORDS

climate change, environment, human/nature binary, knowledge production, more-than-human worlds

In the summer of 2021, I had the great fortune to travel to Greece for ten days, though sweltered under record-breaking summer temperatures while dodging catastrophic wildfires consuming towns north of Athens. As parts of Greece and Turkey blazed, I returned to California to be greeted with news of the Dixie Fire, another out-of-control bushfire consuming large swaths of land north of Sacramento. In fact, across Europe, North and South America, Africa, and into the Siberian hinterland, catastrophic fires were ablaze on an unprecedented scale. As markers of extreme climate crisis, these fires represent the culmination of centuries of extractive capitalism and more recent decades of neoliberal policy that has enabled the largely unregulated global economic exploitation of natural and human resources (Malm, 2016).

While in Greece, I received from leading globalization scholars the wonderful invitation to contribute to a special volume titled *Globalization: Past, Present, Future*. In the call for essays, the editors suggested engaging with topics such as global governance, populism, digitization, new economic systems, new forms of democracy, and theoretical and methodological models to better understand globalization and its reconfiguration in the twenty-first century. They urged contributors to engage with what they call the "Great Unsettling" and the current conditions of insecurity, uncertainty, and dislocation that mark the present moment. And they called for, among other things, evaluations of globalization dynamics from Indigenous, Southern, postcolonial, or intersectional perspectives that disrupt the dominant narratives in the Euro-American academy. Notably, what was not mentioned at all in the list of today's "serious disintegrative threats to the social cohesion and stability of familiar lifeworlds" was the destruction of the environment and biodiversity unfolding on a global scale and related climate crises and injustices impacting the world.

In this essay I argue that the relationship between globalization—however defined—and imminent ecological collapse is central to any conversation about the past, present, and future of global processes and related theories of globalization. Environmental degradation has a long history, related to colonial expansion, imperialism, capitalism, and the looting of resources in Africa, the Middle East, and the New World by European powers. Extreme environmental degradation marks our current era, enabled through neoliberal and neocolonial logics and unregulated processes of extractivism in both the Global South and Global North. Future predictions of environmental degradation and the disruption of atmospheric, oceanic, and biological earth systems suggest we are facing imminent collapse of all we take for granted (Intergovernmental Panel on Climate Change, 2022). In the words of the French philosopher Bruno Latour, earth is turning back on itself, and the land that we so confidently occupied in the past is now actively occupying us (Latour, 2018; see also Chakrabaty, 2021). We are facing a great unsettling indeed![1]

My central argument is that our collective future is one of climate-driven globalization. By this I mean that the climate crisis has necessarily become the

broader context in which all discussions of globalization must be analyzed. Nature's destruction by humans is not one competing narrative about globalization and its winners and losers, as some would argue (Roberts & Lamp, 2021). Nature's destruction is the dominant and central narrative because it ultimately informs our collective final story. If the forests burn, the oceans rise, and the waters dry up, Mother Nature's loss is ultimately the loss of humanity itself. So, we can debate all day long: Is globalization market-driven, as many Western scholars would have it? Or does politics play a greater role? What about cultural, religious, or civilizational conflict? My point is that the modernist construct of nature as something distinct from the human, as an arena to be idealized, managed, or exploited, has blinded us from seeing the ecological calamity unfolding before us (Cronon, 1996). We have entered a new anthropocentric era in which the planetary earth system is decentering human agency itself (Chakrabaty, 2021). What this means for scholars is that the causes and consequences of human-driven climate change should frame and inform all global concerns, be these pandemics, political polarization, mass migrations, infrastructure, famine, economic instability, nuclear warfare, failure of global governance mechanisms, and so on.[2]

The climate crisis is why I decided to accept the invitation to contribute to this volume. I don't wish to disrespect my colleagues for what I consider their blinkered thinking, but rather to insist that we can't go on theorizing about globalization and its causes and consequences, winners and losers, without also foregrounding long histories involving the violent destruction of dehumanized peoples, animals, and fragile ecosystems, particularly in the Global South (Shiva, 2013; Angus, 2016; Malm, 2016). This essay is an urgent plea for scholars in the Global North to "look up" from their computers and privileged Eurocentric worldviews and take seriously ecological collapse and our increasingly fragile collective futures. If we are to slow the climate crisis, we need to overcome a dominant human/nature binary and renew a consciousness about the relationality between humans and more-than-human worlds. This consciousness has been eclipsed for centuries in knowledge emanating from the Euro-American academy and is tellingly absent in most of today's theorizing in the Global North about globalization.

LESSONS FROM ANCIENT TIMES

As Manfred B. Steger, one of the leading theorists of globalization reminds us, third-century-bce Greek astronomers were some of the earliest to introduce the notion of Earth as a rounded orb or ball (Steger, 2021). Ancient Greeks imagined access to the core of this spherical Earth to exist at Delphi, north of Athens, where the Oracle of Apollo was consulted by kings, military leaders, and elites from all over the world desiring to know the future. While Apollo was the god of the sun, the word *apollo* means stone. According to Greek mythology, Chronos, god of the heavens, and his wife Rhea, daughter of the earth goddess Gaia, had children. But Chronos believed a prophecy that one of his children would take away his

FIGURE 14.1. The navel or *omphalos* stone. Delphi, Greece, 2021. Author's photograph.

throne, and to stave off this possibility he devoured each child at birth. Rhea was so distressed that she gave birth to her last child, infant Zeus, in a cave on the island of Crete, substituting for the child a stone wrapped in swaddling clothes (the *omphalos*), which Chronos devoured (Johnson, 1982).

In a related myth, Zeus sent two eagles to opposite ends of the world (east and west) to search for his "Grandmother Earth" or Gaia. They flew around the world and crossed paths at Delphi. Zeus then declared Delphi to be the center of the Earth where the *omphalos*, or navel/womb of Gaia was found, and placed a monumental stone there. Travelers seeking the Oracle entered the scared Delphi precinct where they were greeted by the navel stone atop a pillar, flanked by eagle sculptures. It must have been an awe-inspiring vista for the traveler looking down from the Delphi sanctuary, across other temples and sacred sites, into the sweeping Pleistos River Valley below. Today the original marble monument can be seen in the nearby Delphi Archeological Museum, and outside in the precinct a simplified stone version marks the spot where the monument was originally installed (figure 14.1).

Another ancient tale involving the navel or *omphalos* surrounds the monks of Mount Atos, a mountain and peninsula in northeastern Greece. The mountain is known as the Holy Mountain and was the home of early Greek and Christian monks since 200 ce. While Christianity was a new religion at this time, it slowly gained strength across the region, and by 312 ce the Roman Emperor Constantine had become a supporter for political and financial reasons, securing the religion's prominence. Constantine believed that a religion based on the worship of a single god, in contrast to the multitude of gods worshipped by Greeks, would be a better mechanism for holding the vast Roman Empire together (Cameron, 1994; Ehrman, 2018). In 313 ce Constantine issued the Edict of Milan, which legalized Christianity across his vast lands, and so began the slow decline of Hellenic

FIGURE 14.2. *Satyres en atlante*. Four statues depicting *omphaloskepsis*. 2nd Century. Roman, Marble. Louvre Museum. Wikimedia Commons.

religious rituals that were increasingly deemed pagan and outlawed. Numerous Christian monasteries were built on Mount Atos, correlating to a decline in Greek devotion to the Olympian gods and the power of Delphi and the Oracle. In 393 ce, Emperor Theodosius ordered the closing of all pagan sanctuaries including Delphi, which was taken over by Christians and finally abandoned in the seventh century (Scott, 2015; Beaton, 2021).

While information is scarce, it is evident that Christian monks living in the monasteries on Mount Atos practiced social isolation, especially from women. They also engaged in forms of rapture to aid their spiritual mediation with God that included gazing at one's navel. According to John G. Millingen, a surgeon serving in the British army in the early nineteenth century, the monks were *omphalopsychians*, or navel-gazers; Millingen writes that they "pretended or fancied that they experienced celestial joys when gazing on their umbilical region, in converse with the Deity" (1839: 40). This form of unique mediation is visualized in a large Roman marble sculpture dating from the second century, housed in the Louvre Museum (figure 14.2). Today, the expression *navel-gazing* refers to someone who is self-absorbed, has lost perspective, and has limited desire to move, change, or relate to their surrounding world.

These Greek and Roman histories from ancient times make an interesting contrast and represent different modes of human imaginary. Delphi's navel as the

outward-facing gateway of the world underscores connections between east and west, animals and humans, as well as across space and time. At Delphi the world was the focus of the gaze, and the navel the entry point to an inclusive sphere that included relations between women and men, animals, nature, deities, as well as the stars, sun, and moon. In contrast, the imaginary of Mount Atos's navel-gazers was inward-looking, exclusive, self-absorbed, and anthropocentric. In the statue, male humans are the central gazers looking back at themselves in awe, their very bodies the channel through which the male divinity is received. In this exclusionary Christian worldview, eclipsed, if not forgotten, was the expansive and much more holistic imaginary of Hellenism.

Notable in the rise of the Roman Empire over the Greek world was the instrumental relationship between Christianity, imperialism, and trade. Often overlooked is that Christianity was put into the service of the Roman Empire hundreds of years before it would be put into the service of Europeans, extending their imperial reach into the Middle East, Africa, and the New World. This territorial reach was justified through the Pope's Doctrine of Discovery (1493) and substantiated through the concept of *terra nullius*, which legally justified the western possession of lands and founding of capitalist trading networks (Charles & Rah, 2019). Putting this differently, in the modern era Christianity (both Catholic and then Protestant denominations) served as an institutional frame and moral justification for the conquering of lands, slaughter of Indigenous and dark-skinned peoples, and extraction of natural resources to trade for profit back home in the European motherlands.

PARADIGM WARS

Differences in how humans imagined their place in the ancient world—between Delphi as the navel opening out to the world on the one hand, and the exclusionary monk navel-gazers on the other—percolate across the centuries to reemerge today in what scholars have called the paradigm wars. This phrase refers to competing ideals of how people should live and be in the world and is often used to superficially describe the differences between European and non-European societies—what today is often referred to as the contrast between a Global North worldview, informed by modernist thinking, and a Global South worldview, which relates to a wide spectrum of cosmologies and different kinds of knowledge that was historically considered (by the West) to be primitive or premodern and thus inferior.

Of course, there is no such thing as a homogenous Global North worldview, just as there is no such southern counterpart. Wherever one is in the world, there are always alternative thinkers, philosophers, and belief systems that work against dominant epistemological and conceptual frameworks. Still, in the era of post-Enlightenment Europe, the power/knowledge nexus and the institutions through which it was practiced "allowed" certain ideas to flourish and others to be ignored,

marginalized, silenced, or even erased (Foucault, 1995). In late-eighteenth- and nineteenth-century Europe and the United States, and across a wide range of colonies, there emerged a shared set of dominant values, experiences, and discourses woven together through state and social institutions, extractive capitalistic logics, and cultural hierarchies of white Christian racial superiority (Said, 1979). This imaginary was not static or fixed and was heavily influenced by encounters with Others in colonial territories in the Americas, Africa, Middle East, Asia, and the Pacific (Memmi, [1965] 1991; Fanon, 1968; Lowe, 2015). Nonetheless, it can be argued, a Western worldview had become consolidated by the late nineteenth century, reinforced in international law and scientific knowledge, and intimately connected to the expansion of a global political economy centered on European industrialization and promotion of world trade (Hobsbawm, 1987; Ferro, 1997). This worldview was sufficiently cohesive that those associated with Pan-Africanism in the post–World War II decolonial period pushed explicitly for an alternative set of values and "worldmaking" (see Getachew, 2019).

A recent iteration of this differentiation between European and non-European perspectives appears in the edited volume *Paradigm Wars: Indigenous Peoples' Resistance to Globalization*. This publication was an important intervention emerging out of the conversations among Indigenous communities shaping the UN Declaration on the Rights of Indigenous Peoples that was adopted by the General Assembly in 2007. As Jerry Mander writes in the volume's introduction, while there are many Indigenous communities around the world, often very different from each other, they typically have "shared primary values as reciprocal relationships with nature, economies of limits and balance, the central importance of community values and collective ownership, and their integration into and equality with the natural world" (Mander, 2006: 4). Indigenous peoples' complex cosmologies, mythologies, and holistic appreciation of humans' relationality with more-than-human worlds echo some key elements in the cultural values of the denigrated "paganism" of Ancient Greece.

The opposing paradigm, according to Mander, reflects a modernist Western perspective that has deep roots in the logics of European colonialism and extractive capitalism and dominates today's global political economy (Mander, 2006). This paradigm is centered around ideologies of economic growth, progress, and individualism. And it is infused with a human/nature binary that is deeply racialized and gendered, ranking certain people (i.e., white, male) above all other biological life while simultaneously disconnecting all humans from the environments they inhabit (Haraway, 1990). As William Cronon noted in his highly influential essay "The Trouble with Wilderness; or, Getting Back to the Wrong Nature," Western intellectual thought constructed a particular image of what constitutes nature. In his words: "The place where we are is the place where nature is not" (Cronon, 1996). Ecofeminist philosopher Val Plumwood takes this line of thinking a step further in her important book *Feminism and the Mastery of Nature*, calling the

human/nature binary "the foundational delusion of the West" and arguing that it is a "dangerous doctrine, strongly implicated in today's environmental crisis." Plumwood states that this binary is reinforced by a set of "interrelated and mutually reinforcing dualisms . . . that forms a fault-line which runs through its [Western culture's] entire conceptual system" (Plumwood, 1993: 42). Some of the more obvious of these include male/female, mind/body, master/slave, civilized/primitive, lawful/lawless, and Christian/pagan.

The modern Western paradigm reflects a self-absorbed, individualistic, and profit-driven understanding of the world. As part of the commodification process of capitalism, Europeans regarded the natural environment as an object and resource to be used for human purposes and financial gain. The paradigm was justified through the creation of a racialized hierarchy in which white societies were considered superior over "uncivilized" darker peoples and the natural environments they inhabited. Conveniently, this racial hierarchy enabled exploitative relations between colonizers and colonized and created a worldview in which the elements of nature (including Indigenous peoples and African slaves who were typically not considered human) were widely regarded as resources to be possessed, plundered, bred, killed, mined, deforested, burned, polluted, and so on. This interlinked system of colonialism, capitalism, and slavery—what Cedric Robinson called "racial capitalism"—persists within our contemporary world.[3] It maintains the power of a global capitalist elite and continues to inform extractive capitalist practices that are dramatically warming the planet, creating disposable communities, destroying biodiversity and fragile ecosystems, and driving planetary collapse.

As we all know, extractive capitalism disproportionately impacts the poorer countries and more vulnerable peoples who live primarily in the Global South. Rob Nixon has eloquently argued that those in the Global North often cannot see the "slow violence" affecting those living in the Global South, "a violence that is neither spectacular nor instantaneous but instead incremental, whose calamitous repercussions are postponed for years or decades or centuries" (Nixon, 2011). Many people living in wealthy industrialized societies live a life that responds to what is immediate and obvious, exemplified by the fast-paced corporate news cycles. One result is that our political and emotional responses are inadequate to comprehending the quiet oozing of toxins into rivers, the drip . . . drip . . . drip . . . of melting glaciers, or the silence of birdsong or reduced humming of bees (Carson, [1962] 2002). Nor do we see mining contractors shooting Indigenous land protectors deep in the Amazonian rainforest or mercenaries hired by Monsanto, the multinational seed company, poisoning small farmers who refuse to plant its genetically modified seeds. Nixon goes on, "To confront slow violence is to take up, in all its temporal complexity, the politics of the visible and the invisible" (Nixon, 2011).

The paradigm wars suggest elements of what may be missing in our dominant theories of globalization. Most theorists of globalization sit squarely on one side of

the divide, and their scholarship reflects a modernist Euro-American perspective. But taking opposing paradigms seriously suggests a multiplicity of ways of thinking and knowing, other perspectives that narrate countertraditions, histories and storytelling, and importantly, alternative modes of living with nature.

MORE-THAN-HUMAN WORLDS

Against a global economic system of extractivism and racial capitalism, I argue that we need to open our eyes, look up, and think *with* and *through* the natural world to overcome the human/nature binary that prevails in the dominant thinking of the Global North (Darian-Smith, 2022). This means relearning understandings of relationality between humans and the places where people live and ultimately depend upon for survival. Of course, I am not alone in this argument, and growing numbers of scholars in the Euro-American academy are pushing for the widening of theoretical, analytical, and methodological approaches that take seriously the coconstitutive relations between people and nature. This includes a wide range of scholars associated with ecofeminism, new materialism, socioecological thought, decolonialism, posthuman and nonhuman literatures (i.e., Warren, 2000; Shiva and Mies, 2014; Grusin, 2015; Mignolo and Walsh, 2018; Davies, 2022). And perhaps most importantly, it includes the work of Indigenous scholars who are helping scholars who are non-Indigenous understand the limits of their theoretical models in the light of the unfolding climate crisis (Wildcat, 2009; Kimmerer, 2013; Gilio-Whitaker, 2019).

What do I mean by more-than-human worlds? Often referred to as other-than-human worlds or the nature-culture-nexus, the concept is quite simple. The expression refers to a world that includes and exceeds humans, underscoring the complex interdependencies between all biological life on the planet. It fundamentally seeks to disrupt the dominant human/nature binary and refutes the perspective that sees humans as superior in the belief that they can control nature. This means thinking of humans as living within and being part of nature—what Donna Haraway calls *naturecultures (Haraway, 2008; Merrick, 2017).*

The term "more-than-human-world" is often associated with the deep insights and knowledge held by First Nations and Indigenous communities who see kinship and intimate relations existing between all biological things. In the context of the climate emergency, the term has been taken up by scholars and activists to highlight our relational dependencies on forests, rivers, oceans, and clean air for basic human survival (Kohn, 2013). In the more-than-human framework, people are not understood as autonomous entities distinct from the natural world. Rather, according to anthropologists Tim Ingold and Gisli Palsson, humans are "fluid beings, with flexible, porous boundaries; they are necessarily embedded in relations, neither purely biological nor purely social, and their essence is best rendered as something constantly in the making and not as a fixed, context-independent species-being" (Ingold & Palsson, 2013: 39). This mode of relational thinking

aligns with many Indigenous scholars. For instance, Jack Forbes, a leading Indigenous scholar and founder of one of the first Native American Studies programs at the University of California, Davis, writes:

> I can lose my hands and still live. I can lose my legs and still live. I can lose my eyes and still live . . . But if I lose the air I die. If I lose the sun I die. If I lose the earth I die. If I lose the water I die. If I lose the plants and animals I die. All of these things are more a part of me, more essential to my every breath, than is my so-called body. (Forbes, 2001)

The dominant thinking in the Global North that has prevailed for centuries is that economies, societies, and ecological systems are distinct yet overlapping arenas. In contrast, a more-than-human worldview visualizes these relations as synergistic and mutually constitutive but ultimately framed by ecological systems, or what is often called the web of life. These relational entities are not monolithic (diverse natures, diverse societies, diverse economies, diverse laws, and so on). Moreover, in the more-than-human worldview, if the human species, like those of dinosaurs, becomes extinct the web of life will adapt and regenerate without human presence. This means that contrary to mainstream Western thinking, humans (e.g., Elon Musk) are not in the driver's seat and able—through technology, scientific knowledge, and entrepreneurial innovation—to manage and exploit nature indefinitely. The arrogance of such anthropocentric thinking is precisely what has led to the ecological emergency we are all facing today, albeit poor, marginalized, and Indigenous peoples are disproportionately impacted by it.

My point is that political and economic elites are invested in silencing alternative perspectives such as more-than-human worldviews because global asymmetries of structural power require it. This is why, notes the Indian writer Amitav Ghosh in his book *The Nutmeg's Curse: Parables for a Planet in Crisis* (2021), global elites understand climate change as a "techno-economic" concern, but:

> for the have-nots of the world, in rich and poor countries alike, it is primarily a matter of justice, rooted in histories of race, class, and geopolitics. From this perspective, climate negotiations are not just about emissions and greenhouse gases; they hinge precisely on issues that are not, and can never be, discussed—issues that are ultimately related to the global distribution of power. (Ghosh, 2021: 158–59; see also Gilio-Whitaker, 2019)

BLINKERED GLOBALIZATION THEORY

Unfortunately, most theorists of globalization in the Global North remain largely unaffected by emerging conversations about more-than-human worlds and the call to rethink human relations with nature, which are particularly pertinent given the looming climate emergency. Putting this differently, these theorists have not engaged with what is going on in a wide range of critical scholarship and innovative social theory across the humanities and social sciences. And beyond

the academy, these theorists seem impervious to an escalating climate crisis and related social and environmental justice movements that are hard to ignore. It should be remembered that 2019 marked a milestone in terms of global protests about the climate emergency. In September of that year, the Global Climate Strike saw protests taking place across 4,500 locations in 150 countries with an estimated participation of over six million people including many school students, activists, scientists, and community leaders in what has been called the largest climate strike in world history.

The lack of scholarly engagement in both pioneering intellectual conversations and widespread social protests forces us to consider the production of globalization theory and ask fundamental questions. I ask, along with Steger, to what degree do globalization theories reflect Eurocentric values, priorities, and modes of thinking (Steger, 2021)? More specifically, I question to what degree globalization theories implicitly endorse dualisms such as the human/nature binary, "which runs through [Western culture's] entire conceptual system." What does this say about the relevance of our work, removed from cutting-edge Western and non-Western scholarship and the realities of billions of people's degraded lives? These questions are significant, speaking to the core of the work we do, the power relations we unconsciously endorse, the cultural and ethical values we reflect, and the privileged positionality we take for granted as scholars in the Global North.

In 2015 I wrote an essay about the new field of global studies, which takes seriously theories of globalization. The title of the essay posed a question: "Global Studies—Handmaiden to Neoliberalism?" It was based on a paper I presented on a panel attempting to define the field of global studies, comprised of five senior white men, myself as the only woman, and no scholar of color in sight. In the paper I argued:

> Scholars involved in global studies may want to think about how to decolonize this new field of inquiry and be more inclusive of pluralistic perspectives and subject positions within our global research. This would require us first acknowledging the current power biases within the field of global studies, and then actively seeking conversations and collaborations with colleagues from across the global south, east, and north. It would require us to move past macro structural frames and analyses that many of us hide behind, and engage with the local, the particular, the unpredictable, and the personal. It would require us to be open to new, perhaps counter-intuitive, concepts, and narratives. And it would force us to interrogate our own deeply embedded and historically informed ethnocentric Western assumptions. I am not suggesting that this could happen overnight, or that it will even happen any time soon. But I do think it is important to talk about. Otherwise, global studies may end up being a white man's club. Worse still, future historians may call the field of global studies the "handmaiden of neoliberalism" (Darian-Smith, 2015: 166; Darian-Smith, 2019).

Since 2015 a few global studies departments in the United States have become increasingly diverse in terms of faculty experiences, training, perspectives, and worldviews. And some scholars in these programs take seriously the need to decolonize the epistemological assumptions built into Western knowledge production (Santos, 2007; Mignolo, 2010; paperson, 2017; Bhambra and Nisancioglu, 2018).[4] But, as Steger has noted, only a small number of globalization theorists have challenged the biases of Eurocentrism (Steger, 2021: 34). This accords with most departments in the social sciences and humanities that have shifted very little, if at all, in their intellectual orientation, research priorities, and positionality despite the bombardment of diversity, equity, and inclusion (DEI) rhetoric by university administrators. This is particularly true in political science, sociology, and economics departments, where most of the dominant globalization theorists reside (Darian-Smith, 2017).

Why is this the case? What are the structural, institutional, and ideological limitations that impact the willingness of mainstream globalization theorists to engage the realities of a global system that involves pluralist cultures, communities, and perspectives? Relatedly, why are globalization theorists not engaged with the global politics of knowledge production and their privileged positionality within that sphere? Why are they apparently unwilling to concede—judging from the literatures cited in their scholarship—that globalization may seem very different to a scholar born in the Global South and, importantly, that they could learn much from that person? Here I am thinking about the overlooked work of scholars such as Ngũgĩ wa Thiong'o, a comparative literature scholar born in Kenya, who provocatively theorizes about globalization in his book *Globalectics: Theory and the Politics of Knowing* (2014).

This raises another series of questions: Why have mainstream theorists of globalization failed to engage the enduring legacies of environmental degradation implemented over long histories of European colonialism and economies of extractive capitalism? Why, when analyzing such things as the interconnectivity enabled by technology and financialization, and ongoing security and trade conflicts over oil and natural resources, is there a failure to "see" the environmental degradation and injustices concurrently at play? Or when analyzing today's sources of extreme-Right populist discontent, how it is possible to ignore that people's anxieties about growing inequality are connected to the negative impacts of the climate crisis that harm people's jobs, lands, and livelihoods and create grave environmental injustices in the Global North and Global South (e.g., Axford, 2021; Pieterse, 2021)? It seems that one would have to be deliberately myopic to overlook what the majority of poor people living in the Global North and Global South confront daily in terms of land-grabbing, toxic mining, mega-dam building, food insecurity, pollution, deforestation, drought, heatwaves, rising oceans, and catastrophic fires and floods (figure 14.3). Importantly, not just the poor and marginalized are affected

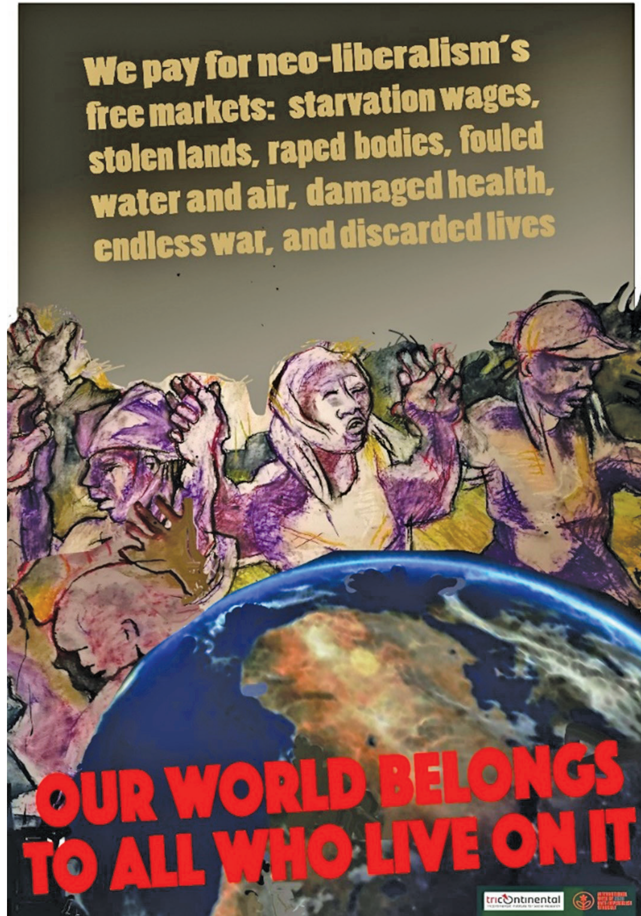

FIGURE 14.3. Judy Seidman, South Africa. 2020. “Our world belongs to all who live on it” is based upon the statement of South Africa’s 1956 Freedom Charter (the founding document of the anti-apartheid struggle): “South Africa belongs to all who live in it.”

by the climate crisis—a fact that most globalization scholars in the Global North seem to overlook. As noted by the journalist Matthew Taylor, “As the climate crisis escalates it will have an impact on most aspects of our lives wherever we are living, from security to the cost of living, from where and how we live and move around, to our diets and even our jobs” (Taylor, 2022).

Below I list what I see as some of the reasons for blinkered thinking among mainstream theorists of globalization in the Euro-American academy, though I am sure others could contribute additional points:

1. Globalization theory in the Global North, though it analyzes global processes, has historically emerged out of a comparative state-centric analysis. This reflects the dominant training of mainstream globalization theorists within social science disciplines such as political science, international relations, sociology, law, and economics (Darian-Smith, 2017).

2. State-centered scholarship is by the nature of its modernist theories, analytical concepts, and methods blind to—perhaps even dismissive of—knowledge and epistemologies not grounded in state territorial assumptions. Put simply, humans' coconstitutive relations with the natural world don't fit into established models, literatures, and scholarly imaginaries within the Global North. This is particularly problematic in the case of the looming climate emergency, which calls for a rethinking of our core assumptions about what constitutes the "social" that may not neatly correlate with societies contained by national borders.
3. Disciplines such as political science, sociology, law, and economics pride themselves on the production of "empirical" knowledge, implying they produce "objective" social-scientific data and apolitical analysis. More disturbingly, there is an assumption that this data has universal application. Such objectivity veils an intellectual conservativism that resists engaging with issues of power, privilege, and Eurocentrism and avoids thinking about—let alone fostering—social or political change. Drawing upon the insights of Rob Nixon, globalization theorists have simply been unable to "see" the environmentalism of the poor (Nixon, 2011).
4. Relatedly, even among interdisciplinary scholars, there is a tendency to be critical but not constructive. By this I mean that it is easy to critique a given system and structure of power, but both difficult and risky to create a new conceptual framework that can be dismissed by mainstream scholars as irrelevant. Perhaps this accounts for the lack of scholarship that effectively embraces transdisciplinarity within the Euro-America academy (Esser & Mittleman, 2017; Darian-Smith & McCarty, 2017; Steger, 2019). With respect to the study of the climate emergency, transdisciplinarity suggests the need to engage a wide range of knowledge produced within the social sciences and humanities, as well as knowledge produced by earth-systems scholars, biologists, geologists, and climatologists to gain a more holistic approach to analyzing the complexity of the problem. This requires much effort and is difficult, though it can be done. An outstanding example of this kind of transdisciplinary scholarship is Kathryn Yusoff's book *A Billion Black Anthropocenes or None* (2019). But this kind of pioneering work is not always supported by funding agencies and professional scholarly associations, nor given the recognition it deserves in university guidelines on faculty merits and promotions.
5. If scholars within the Euro-American academy do bump up against environmental degradation, it has historically been in former colonies and poorer countries of the Global South. In other words, until very recently climate change was perceived as a problem for people over "there," and not a real concern for the people of rich countries in the Global North. This geopolitical spatial disconnect has helped profile the environment as not a very sexy, fundable, or relevant research topic. Thankfully, however, this is changing.

6. Today's dominant globalization theories emerged in the 1990s, focusing on the causes and consequences of neoliberal processes that were, and continue to be, primarily understood as driven by a global political economy. In this market-based narrative, nature continues to be seen as a resource and object of commodification, reinforcing the centuries-old human/nature binary and (neo)colonial basis of capital accumulation. So, it is not surprising that much globalization theory has overlooked the impact of neoliberalism on the environment (and related disproportionate impacts on women, poor, Indigenous, and racially marginalized communities). This silence suggests, at best, ignorance and privilege, and at worst racism, sexism, and complicity in reproducing the exploitative logics of late capitalism.
7. Perhaps most profoundly, there is yet no agreed-upon discourse among scholars in the Global North for transcending the human/nature binary that would allow us to think relationally *with* and *through* nature. This would involve, as Margaret Davies has noted, "upending everything we thought we knew and creating with, and working with, new concepts" (private conversation). Not all scholars are capable of this or prepared to take on this demanding work, even in the unlikely event that many agree it is an appropriate path forward.

CONCLUSION: CLIMATE-DRIVEN GLOBALIZATION

Not unlike the Roman monks on Mount Atos from ancient times, most scholars in the Global North sit in exclusive office-cells perched high in the ivory tower of universities, gazing out at the people below, seeking knowledge through individualized worldviews as if these represent all of humanity. This scholarly purview is premised—literally, structurally, and epistemologically—on the colonization, possession, and exploitation of lands and peoples.

However, taking a cue from the Greeks at Delphi who held a very different attitude to the world than the Romans, it is possible to imagine a world based on openness and receptiveness between humans and more-than-humans, rather than a world of bounded projections of racialized and gendered individual control. Drawing on the insights of ancient Greece, today's global studies scholars can play a vital role in resisting the elite positionality of the Euro-American academy by highlighting and promoting the diversity of perspectives and worldviews that inform our collective futures. Understanding the bottom-up entangled connections of global processes, global studies scholars are uniquely positioned to underscore the politics of knowledge production that have historically silenced alternative understandings of being in the world. Specifically, in this essay I have argued that this means transcending the human/nature binary and embracing the complex relations people have with nature that have for centuries been marginalized in Western thinking. The more-than-human framework that is currently

gaining traction across the academy provides a theoretical and epistemological lens through which to relearn humanity's interconnections with the planet. The stakes could not be higher. In the context of imminent ecological collapse, revitalizing knowledge about the centrality of nature is integral to long-term human survival.

But relearning one's interconnected place in the world is never going to be easy, no matter how necessary or important it may be. Manfred Steger acknowledges this difficulty. In an opening bid to "decolonize globalization theory by cutting it loose from its Euro-American moorings," he calls for the integration of four relevant keywords into contemporary theorizing about globalization—Eurocentrism, epistemicide, Anthropocene, and ecocide (Steger, 2021: 35). I am hopeful that scholars will take this call seriously, but I am also skeptical of its efficacy. As Ghosh reminds us in *The Great Derangement*, the climate emergency presents a crisis of cultural imagination (Ghosh, 2016). It is extremely difficult, and maybe even impossible, for people to cut loose from existing systems of language, imagery, ideology, and myth that inform a common "background" enabling people to communicate (Hekman, 1999). Embracing a vocabulary that underscores asymmetries of global power and the devastating impacts of globalization on peoples, animals, and environments may be a good first step. But it is unlikely to generate alternative ways of thinking and the "epistemic disobedience" required to overcome the narrow-mindedness of scholars in the Global North (Mignolo, 2010).

So, what are we to do? In this essay I have argued that debating globalization and trying to frame and analyze what is going on in the world by adopting a new vocabulary is simply inadequate. What is needed is far more difficult: we must critically understand our political and ethical engagement with all biological life and, in turn, ask, how do we relate to being in the world *together*? This will require scholars not necessarily cutting loose but rather teasing out the alternative perspectives and marginalized approaches within our existing Eurocentric theories. So, it is not a matter of arguing that non-Western perspectives are better, superior, or more truthful than Western perspectives, as some involved in the paradigm wars discussed above would argue. Rather, a more productive stance would draw on existing discourse to shift the conversation and create new meaning to suit new purposes. This new intellectual background would then be—hopefully—more responsive to non-Western theories and approaches. The feminist scholar Susan Hekman wrote about this strategy decades ago in her efforts to insert feminist perspectives into a male-dominated academy, arguing "that shifting the riverbed of thought requires not just changing the meaning of words but also telling a different story. It must be a story that is intelligible in terms of the story we have been told but one that also illuminates its strangeness [and unfamiliarity]. What is required, in short, is the construction of a new narrative" (Hekman, 1999).

How would we, for example, create a new narrative that takes seriously the implementation of what Vandana Shiva, the renowned environmental activist, calls "earth democracy" (Shiva, 2015)? Or how could we rethink the human subject more

holistically, not as the hierarchical owner of property and nature but as a cohabitant with the environment embedded within a *natureculture* continuum—what the critical sociolegal scholar Jana Norman calls the "cosmic person" (Norman, 2021)? Notably, in what ways do these interventions shift dominant meanings of nationalism, citizenship, identity, territory, economy, and governance that underpin most theorizing of globalization? I want to be clear that these kinds of questions are not a superficial mental exercise but are driven by immense urgency and relevance. The third report by the Intergovernmental Panel on Climate Change says the world is at a "crossroads" and we have about eight years to slow down greenhouse-gas emissions to "secure a liveable future" (IPCC, 2022). The escalating intensity and scale of catastrophic fires and floods experienced around the world in the past few years is a dark omen of things to come (Darian-Smith, 2022).

My central argument is that our collective future is one of climate-driven globalization. Given this reality, theorists of globalization need to rethink their subjects and objects of study and create a new narrative of their coconstitutive association. They need to open their eyes, hearts, and minds to what many may find an unfamiliar and uncomfortable terrain of inclusive relationality between human and more-than-human worlds. This will require relearning, reimagining, and retelling people's place in the world across nonlinear time and space—across intergenerational pasts and futures, across entangled histories of colonialism and racism, and across spheres of kinship that include women, men, animals, forests, oceans, soils, atmospheres, and the sun (Haraway, 2008; Winter, 2021). Putting this differently, scholars must first come to terms with planetary agency that merges human subjectivity with nonhuman forces if our scholarly discussions are going to remain relevant to unfolding real-world crises and contexts (Clark & Szersynski, 2020). On this note, the prescient words written decades ago by William Cronon come to mind:

> It means looking at the part of nature we intend to turn toward our own ends and asking whether we can use it again and again and again—sustainably—without its being diminished in the process. It means never imagining that we can flee into a mythical wilderness to escape history and the obligation to take responsibility for our own actions that history inescapably entails. Most of all, it means practicing remembrance and gratitude, for thanksgiving is the simplest and most basic of ways for us to recollect the nature, the culture, and the history that have come together to make the world as we know it. If wildness can stop being (just) out there and start being (also) in here, if it can start being as humane as it is natural, then perhaps we can get on with the unending task of struggling to live rightly in the world—not just in the garden, not just in the wilderness, but in the home that encompasses them both. (Cronon, 1996: 25)

NOTES

With much appreciation I thank Manfred Steger and Margaret Davies for their excellent feedback on earlier drafts.

1. Writes Latour, "How can we say where we are if the place 'on' or 'in' which we are located begins to react to our actions, turns against us, encloses us, dominates us, demands something of us and carries us along in its path? How are we to distinguish between physical geography and human geography? . . . How do we occupy a land if it is this land itself that is occupying us? (Latour, 2018: 41–42).

2. Nuclear warfare presents a more immediate threat to life than human-driven climate change. But unlike nuclear war, the scale of climate change is planetary and irreversible in terms of it transforming entire earth systems that point to the extinction of the world's human population.

3. *Racial capitalism* refers to a process in which white individuals and institutions use nonwhite people to acquire social and economic value. The term was first coined by Cedric Robinson, who argued that racism was already apparent in feudal times and formed the basis for modern capitalism and its systems of racialized oppression and exploitation that endure into the contemporary era. See Robinson (1983).

4. In terms of my own experience, I am thinking about the Department of Global and International Studies at the University of California, Irvine that I helped launch in 2018 and makes decolonizing the Euro-American academy its stated mission, as well as some of the faculty in the Department of Global Studies at the University of California, Santa Barbara, which I formerly chaired.

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PART THREE

Globalization: Future

15

Globalization and Africa's Future Sustainable Development

Toyin Falola

ABSTRACT
Africa is a continent with vast human and material resources, but its progress towards sustainable development has been slow and sometimes discouraging. Some of its challenges have stemmed from its insertion into the global economy and accompanying power structures from at least the fifteenth century. As the continent's economic progression has not reflected the full value of its assets, Africa houses alarming numbers of impoverished people and nations today. Even as these groups battle political and economic instability, the COVID-19 pandemic has inflicted additional burdens. As a developing continent, Africa must leverage its strengths and match the trajectory of a globalized economy that promises genuine and sustainable development. However, several challenges have created bottlenecks that hinder this agenda, which this work seeks to explore further. This chapter considers the interactions between globalization and sustainable development in Africa, including its state before globalization, the promises of sustainable development, and the benefits globalization and sustainable development may bring to Africa.

KEYWORDS
Africa, economics, globalization, sustainable development

Africa's long-term development cannot be disentangled from the forces of globalization working to enhance economies around the world and make transactions more efficient for everyone—its disproportionate dispersion of benefits and consequences are evident. The African continent has been positioning itself to match the advancing pace of globalization, and its nations have been working to join the ranks of developed countries. The strain of this historical journey has been borne by Africans and their counterparts in Europe and the Diaspora. The

continuous interdependence of states and nations under globalization, playing out in economies, cultures, technologies, and the exchange of values and people, has already led to obvious changes (Kolbi, 2021). Several initiatives like the Agenda 2063 and the NEPAD, among other notable ones, have been put forward by Africa as a collective body to ensure the strong advancement of the continent towards sustainable development and globalization.

Africa is becoming globalized, but gradually, and only after overcoming various challenges. These nuanced difficulties require serious thinking, careful plans, and efficient implementation. Many developmental policies have realized this, but there is an urgent need for the continent to fully embrace the globalization movement. An example of this is the African Continental Free Trade Area (AfCFTA), which offers inclusive and coordinated development and has the potential to be the world's largest free-trade zone (Obeng-Odoom, 2020).

The crux of globalization is the exchange of persons and values. These interactions have made changes in Africa for centuries, and their narratives—along with the narratives of sustainable development—have been colored by European interpretations. Major European powers have explored the world since the sixteenth century, extracting resources and imposing their values on every part of the globe. Asia, America, and other regions, including Africa, were engaged and conquered through that process. The transatlantic slave trade was also a massive exchange of people and resources, with an unequal distribution of benefits. By the mid-nineteenth century, about 12 million people had been extracted from Africa. From around 1880 to the early parts of the twentieth century, about 30 million additional people moved through these channels (Held et al., 1999); with a population of about 130 million, the percentage falls to about 23.08 percent (Akyeampong et al., 2014). By the late nineteenth and early twentieth centuries, the process extended into colonization and neocolonization, laying the foundation for different developments in Africa and facilitating the globalization process (Michalopoulos & Papaioannou, 2016).

Despite this dark history, Africans have worked to capture an advantage from the forces of globalization. The formation of the African Union and various programs and initiatives from collective fronts and individual countries have set globalization in motion on the continent. These efforts must be examined to determine whether they have been sustained and have effectively positioned Africa in the global space.

AFRICA IN THE PRESENT

Africa has been receptive to global forces throughout history, often leading to temporary growth and questionable sustainability. In the race to harness globalization forces, African nations must ensure that they do not sacrifice long-term growth to achieve short-term benefits. The framework of the UN Sustainable Development Goals (SDGs) was developed with these concerns in mind—a commission

chaired by former Norwegian prime minister Gro Harlem Brundtland explained it as the twin requirements of present and future development (United Nations, 1987). Over the past few centuries, Africa has been swept up in a whirlwind of development that has allowed it to match Western accomplishments, such as megacities. As the Pan-African dreams have recently had to make it conform to Africanization, the concept of globalization vis-à-vis development fits within the scope of African discussion.

Africa is a focal point for the seventeen SDGs, which speak directly to the sorry state of the continent. If Africa can advance and globalize in line with the SDGs by 2030, the goal of a sustainably developed Africa can be considered successful, as it would have expectedly fulfilled all the set-out structures and plans, such as the UNESCO's strategies for the role of education in preparing the continent for the future (Shettima, 2016). However, this will require all of the continent's resources and attention to be mobilized so that it can unleash its innate potential. Several challenges may prevent these ambitions from becoming a reality.

One major issue is Africa's endemic political instability. From independence to the present day, postcolonial African countries have retained the political values and structures of their respective colonizing states and have been plagued with political instability linked to inadequate structures and partitioning imposed on the continent by colonial powers (Kieh, 2009). Postcolonial politics have been marred by civil wars and coups that brought violence and destruction, frequently rooted in different ethnic rivalries (Anyanwu, 1982). Governmental rot and electoral instability in modern-day politics have been reduced, but they still affect the continent.

Political instability disrupts economic structures, creating obstacles to sustainable development. The ghosts of the past still haunt the present as political instability remains in Africa. In 2021, Sudan experienced two different coups d'état. One failed in September, and the other led to the dissolution of civilian rule by General Abdel Fattah Burhan (Kirby, 2021). In Guinea, the army ousted President Alpha Conde and has thrown the nation into postcoup uncertainties (Akinpelu, 2021). Mali had two disruptions in the same year, and political violence erupted in Niger within days of its presidential election. From 2000 to 2019, there have been sixteen coups d'état in Africa, demonstrating how serious political unrest has become in the continent. Africa witnessed more coups in 2021 than in the previous five years, with more successful coups since 1999.

Terrorism is another ugly challenge that mars the continent's progress. Africa has become a new springboard for extremists and jihadists looking to actualize their "religious" agendas (Davis, 2012). Extremist groups, such as Al Qaeda and ISIS, have been responsible for many attacks within Africa. For instance, Al Qaeda bombed the embassies of the United States in Tanzania and Kenya on August 7, 1998 (Hoffman, 2014). Other home-grown terrorist groups also encourage the ongoing violence in Africa. The resources that should be committed to facilities

and infrastructure to serve the public are instead being diverted to oppose terrorist attacks. Al Qaeda and affiliated terrorist groups—including Boko Haram in Nigeria, ISIS operations in Libya and Northern Sinai, and al-Shabaab in Egypt and Somalia—require different, coordinated counterterrorism efforts (Alvi, 2019). Other efforts, such as those in Cameroon, Sahel, Mali, Kenya, Niger, Burkina Faso, Uganda, and Côte d'Ivoire, have also consumed substantial resources (Perez, 2021).

It is difficult to prioritize globalization and sustainable development when citizens face extreme poverty, and this is another impediment to progress. As of 2021, about 36 percent of the 490 million people in Africa live in poverty (Human, 2021). These people cannot afford US$1.90 per day, which is the World Bank's international poverty line. The ongoing destruction wrought by extremists, violent attacks, and economic downturns has raised that figure by 9 million people since 2019. The United Nations has recorded a considerable decrease in the poverty rate, down from a whopping 54 percent in 1990 to 41 percent in 2015, yet Africa remains the poorest continent with the largest number of people living in poverty (Beegle & Christiaensen, 2019).

Also, infrastructure is an essential component of the seventeen SDGs to be achieved by 2030. When compared to other continents, Africa has the least amount of infrastructure (Bond, 2017), and such facilities are a major driver of the globalization process. Access to infrastructure affects the continent's economy and the cost of living for individuals. Governments that do not prioritize access to basic amenities for their citizens must be prepared for the economic consequences. Although some countries have made solid efforts to build improvements that will be available to most citizens, there is also the problem of ongoing maintenance. Currently, only about 38 percent of Africans have access to electricity, only 25 percent of roads are paved, and the Internet penetration rate stands at a mere 10 percent. Poor road networks and inadequate facilities, such as ports and railroad terminals, add about 40 percent to production costs. These excess expenses hinder corporate organization and the development of the private sector (Mayaki, 2013).

Education is a core assurance for sustainable development and the advancement of globalization. A lack of education is a major hindrance that wrecks any hope of future development. The continent has made efforts to improve its educational capacity in different areas, but there remains a huge disparity in the accessibility of education, especially in sub-Saharan Africa (Krzykawska & Żur, 2020). Africa's population explosion has been accompanied by increasing school enrollment numbers, but it is a major challenge to find the resources and qualified teachers necessary to support them. Africa has yet to embrace the principle of equality in education—girls remain marginalized, and there is a large disparity between educated male and female children (Kaul, 2015). Despite the focus on gender inclusion in the UNESCO Strategy 2022–29, there is a general lack of health literacy to support girl-child education and literacy (Stephens et al., 2021).

For a long time, tertiary institutions have been dealing with their own educational issues, including union activities.

In addition, the COVID-19 pandemic has been a test of Africa's progress with globalization, offering insights into the work that remains to meet the 2030 SDG targets. Even before the pandemic, Africa's healthcare was deteriorating. Many countries outside the continent have achieved substantial progress with government-subsidized healthcare expenses, but people in Africa must bear around 65 percent of all healthcare costs, despite the continent's poverty levels. The global pandemic has also exposed weaknesses in Africa's other sectors—they are vulnerable to many economic threats. One other thing that might be attributed to the pandemic is the multi-resilience effects of various responses from many sectors of African societies.

The response to COVID-19 has accelerated the development of many sectors, especially healthcare, and many countries have increased their healthcare spending to alleviate the effects of the pandemic. Nigeria announced that it had spent US$9.1 billion, Ghana declared spending US$100 million, Morocco's health sector spent about US$200 million, Gambia spent US$9.8 million, and other countries have also taken additional measures (Ozili, 2020). This is the current status of African countries regarding globalization and achieving the SDGs, which looks discouraging. The continent is unarguably on a path to accelerated globalization, but its progress might be too slow to catch up with the rest of the world; thus, there is a need for coordinated efforts by the continent as a whole to put it on a smoother path.

GLOBALIZATION AND SUSTAINABLE DEVELOPMENT IN AFRICA

The global economy has evolved into a distributed series of supply chains that foster international transactions for specific purposes. This process began mainly in the fifteenth century during Africa's contact with the rest of the world, and this intensive contact with Africa included the exploration period, trans-Saharan trade, and the transatlantic trade, all of which arose from a need to plot new routes for accessing resources. The expanding mining and plantation industries in America led to increased demand around the world (Inikori, 2007).

The demand for resources turned West Africa into a major supplier and point of contact for items like redwood, Benin kingdom's red pepper, Senegambian hides and skins, copper from the Congo Kingdom, ivory, and captured slaves (Inikori, 2007). Despite this increase in trade, the benefits did not accrue equally to Africa and the rest of the world. The continent has repeatedly been at a disadvantage, which explains present-day misgivings about the concept of globalization. The basic development of Africa has been challenged in several quarters as a pretext for the continued exploitation of the continent's resources. For instance,

the helping hands stretched by China have often been questioned as to whether they are focused on development or more concentrated on exploiting its resources (Mlambo, 2018). These assertions have snowballed into criticism of the SDGs, which are attacked for not being Africanized and might not adopt the peculiarities of the continent.

Some writers have questioned whether the SDGs' goals are cognizant of Africa's peculiarities. For instance, it is believed that to achieve quality education, it has to be in line with African cultural values and peculiarities. These interpretations of globalization are birthed from historical experience and precedent in the Western world. Concerns about globalization may contain some elements of truth, but they do not reflect the full extent of its benefits. Globalization describes the development and spread of telecommunication, technology, economics, and humans across the world, including Africa. It highlights the process of positioning Africa within a globally linked network. To gain benefits from this connection, the SDGs must be achieved. The continent must match the development of other nations by developing measurements and programs that will increase its chances. Its efforts must address the disparity between developed and developing economies and countries.

AFRICA AS THE FOCUS OF THE SDGS

The Sustainable Development Goals (SDGs) address poverty, environmental concerns, conflict resolution, gender balance, and justice for all nations. They are designed to see the world grow simultaneously along similar lines by 2030. Most of the basic crises that the goals address are found in Africa—economic activity on the continent declined from 5 percent growth in the previous fifteen years (Zamfir, 2016) to 4.2 percent by 2015, and the downward trend continues (Ighobor, 2015). As a result of COVID-19, the economic state in the continent has been unstable, and the South African GDP was affected by 51 percent at the beginning of 2020. The World Bank predicted that about twenty-six to forty million people in sub-Saharan Africa could experience poverty because of the pandemic (Lakemann, Lay, & Tafese, 2020).

Africa has the largest number of people living in poverty. Reliance on unsustainable businesses, including oil and related commodities, has led to pronounced economic crises in Nigeria and Gabon. Environmental pollution is still a major concern, and the continent's record of managing health hazards leaves a lot to be desired. Africa was a major consideration when the SDGs were set, especially after the protracted failure of the Millennium Development Goals (MDGs) in 2015. Nigeria and Burkina Faso attempted to increase their levels of primary school enrollment from 20 percent to 60 percent by 2015 as part of the MDGs, but they were unsuccessful. These shortcomings led to the adoption of the SDGs (Kindra & Wasswa-Mugambwa, 2015). However, this open acknowledgment of

the continent's shortcomings is progressive. Given that the facts and the statistics above are true, leaders must focus on delivering improvements and devising ways the continent can move forward.

Development is evident in Africa's different sectors, and its people are gradually acclimatizing their cultures to this new paradigm. A new emphasis has been placed on sustainable products and processes, such as agri-business, technology, and other advanced economic concepts by many Africans working towards sustainable development. To spark future growth, significant and noteworthy efforts have been undertaken to provide basic education, developmental possibilities, and communication technology. African bodies and institutions like the African Union, ECOWAS, other confederations, institutions, and organizations have also invested in ecology infrastructure and environmental care (Cumming et al., 2017). Despite the continent's endemic problems, there are slow but progressive developments across various African countries. Nevertheless, Africa can accelerate its progress and attain sustainable development objectives as a result of these efforts, reaping the benefits of globalization while protecting its own interests.

SUSTAINABLE DEVELOPMENT AND PROMISES OF GLOBALIZATION FOR AFRICA

The link between globalization and sustainable development cannot be overlooked. A world where all functional areas and constituting states coordinate effectively is a world that can achieve sustainable development at a faster rate. The work to make SDGs a reality will make great strides towards globalization, creating a global village where everyone has something to offer. This is because achieving the SDGs will increase Africa's development almost to the level of other continents, allowing it to become a producing continent as a result of new striving and successful business and human resources.

Some perspectives regard sustainable development as the opposite of globalization, particularly when globalization is viewed as the goal of capitalists. However, it must be recognized that the "centralization of place" is connected with the development of the same (Barry, Baxter, & Dunphy, 2004). Africa can derive undeniable advantages from globalization and sustainable development. One such achievement is an improved economy, which is the first step toward realizing the SDGs. Globalization's promise for Africa and the developing world is an economic exchange that allows open access to foreign trade and companies. Under globalization, nations are expected to open their borders for improved trade and economic effects, and sustainable development begins with open trade routes, which have been the driving force behind globalization and changed the global economy. This is because many African countries seeking economic transformation develop friendly foreign policies to make globalization easy and facilitate commerce and trade.

Another promise of globalization is educational development to break down the barriers to knowledge. The globalization movement allows unlimited access to education from different sectors. Telecommunication and technology make accessing quality education easier and more achievable—many degrees are received over vast distances with no travel required. This spreads "intellectual capital" and knowledge resources across the world. Great advancements in the decentralization of knowledge and ideas have allowed nations to address the challenges specific to their circumstances. More so, the COVID-19 pandemic has shown how globalization can boost educational development. While many nations resorted to lockdowns, online education continued around the world and learning is no longer restricted to traditional classrooms.

Likewise, embracing sustainable development and globalization advances health care services through global access. Ideas and medical knowledge can be shared globally, enhancing coordinated efforts to battle diseases around the world and providing accessible health care services for everyone. Africa is battling many deadly diseases, such as malaria. Thankfully, global coordination has resulted in medical victory over polio—the combined efforts of global stakeholders and local mechanisms have confirmed that Africa eradicated polio in 2020 (Makoni, 2020). A similar approach was used to reduce the spread of Ebola and slow the progression of the coronavirus. Globalization, speaking the language of sustainable development, presents the health challenges of any location as a global problem to be solved by everyone. The access to various solutions offered by globalization could be a path towards achieving the SDGs that aim to promote healthy lives and well-being of people across all ages.

Globalization has been and will continue to be responsible for the diffusion of cultures and the promotion of cultural heritage. Julio Cortazar defines culture as the "profound exercise of identity" (Standish, 2001). It is a collective consciousness displaying the historical and situational values of a group. Globalization restructures nations and adds new values to each culture, allowing for identity cross-pollination in the world. Globalization's rewards for Africa include the wider distribution of the continent's rich cultures, the infusion of new values, and their decentralization to accommodate other parts of the world. It has introduced different ideas throughout history, and Africa has embraced many of them. Cultures that dehumanize others and promote inequality are usually regarded as wrong because the ideals of cultural imperialism are opposed to globalization. However, globalization can achieve many of the SDGs linked with cultural values, addressing inequality and injustice all over the world.

Africa has already benefited from the spread and mobility of technological advancement under globalization. It affects virtually every aspect of national economies and, as such, could easily put Africa on track to attain the SDGs at an incredible speed. The connections enabled by a globalized world and its interlinked economies allow for the spread of technological knowledge and technology;

therefore, creating an unlimited pathway for science in such an environment and its implementation is easy and unrestricted.

Also, globalization and sustainable development can improve the standards of living in Africa. Out of the approximately eight billion people in the world, more than four hundred million in Africa live in extreme poverty (Human, 2021). With a global economy that decentralizes access to resources across different borders, poverty can be eradicated in developing countries that are the focus of sustainable development. This global concern is the first target for sustainable development. Projects that promote free enterprise can alleviate poverty not only in Africa but around the world. Profitable partnerships between the continent and the rest of the world can boost productivity and enhance standards of living for everyone.

Through globalization, Africa can benefit from accessing new markets across continents. Economic forces would not be constrained within the borders of a single nation, as each country would be able to fish from the ponds of others. Locally made products are already shipped outside national borders and beyond the continent, but the growing strength of technological marketing platforms is providing new access to consumers. Globalization has resulted in the growth of e-commerce as a marketing tool, and the emergence of interconnected economies and global relationships has allowed vast migratory patterns throughout the world. There has been a considerable flux of talented individuals migrating outside Africa and non-Africans moving into Africa. Companies have expanded their human resource pools to draw from the widest possible area, and new talents are being harnessed in every part of the globe.

CHALLENGES OF GLOBALIZATION AND SUSTAINABLE DEVELOPMENT IN AFRICA

Globalization and sustainable development have brought the gospel of transformation to Africa and a promise to resolve age-old problems associated with it. Promoting the right to education, poverty alleviation, and other developmental strategies supported by the SDGs are practical solutions to those problems, but embracing globalization would make it faster. However, these forces are faced with different resistance and new challenges that dampen their energy. The past experiences with globalization have created a wariness within Africa that can be described as historical reluctance. Africa has endured unfair treatment, exploitation, slavery, colonization, and Eurocentric ideology (Garcia, 2014). This makes it difficult to prevent the stereotype of Eurocentric globalization from overshadowing the advantages that globalization and sustainable development can offer. Past experiences have also eroded cultural identities and erased valued customs and heritage from Africa's collective consciousness, cooling the enthusiasm for globalization and offering an explanation for the attitudes of many countries.

African countries have also been buried beneath mountains of debt; resources that could spur development are instead used to service existing obligations. International communities have made efforts to relieve some of this burden, which may be one of the reasons the Heavily Indebted Poor Countries Initiative was launched jointly in 1996 by the World Bank and IMF (Keller, 2007). Unfortunately, the problem has continued to hinder development in Africa. The prevalence of violence, terrorism, insecurity, and political and civil unrest continues to destabilize African countries, making it difficult to promote sustainable development. At times, social, environmental, and economic progress in Africa seems unachievable. Warfare and other social unrest incessantly threaten to undo what little progress has been made towards sustainable development and globalization in Africa.

Globalization and the SDGs link present and future growth, but terrorism, violence, and insecurity continue to endanger the continent. Despite the different campaigns, agitations, and cooperation to set Africa on the right path before 2030, poverty still pervades the continent, and Africa has been dubbed the poverty capital of the world (Beegle & Christiaensen, 2019). To meet the relevant goal for sustainable development, 1.6 people must escape poverty every second. However, due to the militating challenges in the continent, the current rate is 2.6 per day, making success seem unlikely (Human, 2021). These problems are not unsolvable, but they call for deliberate and collective efforts. Can globalization work in Africa? It can, but only if everyone is prepared to contribute.

TOWARDS SUSTAINABLE DEVELOPMENT: MAKING GLOBALIZATION WORK FOR AFRICA

Although the current state of the continent suggests that globalization and sustainable development may not be attained any time soon for Africa, it is possible if every resource is mobilized. It must be widely recognized that Africa cannot meet the basic requirements alone; it needs outside assistance. Countries must establish strategic partnerships within the continent to put Africa on the path to development. Each African country can also forge healthy relationships with the international community, building links with countries as part of specific missions to foster economic development. This, for example, is one of Tunisia's greatest strengths (Saddem, 2001).

Africa must not only make advancements in sanitation and health, but it must also take action to stem environmental degradation. This is a core component of sustainable development because climate change is a serious threat to the human race. In 2010, the Institute for Security Studies declared that Africa receives insufficient rainfall, which is gradually affecting the quality of life and agricultural products on the continent. Changing rainfall patterns have also been responsible for flooding, which has resulted in the loss of life and property in Africa. For

example, traffic and industrial emissions reduce air quality in Egypt and some other parts of the continent. The smelting of copper and roasting of cobalt in the Kuwe area of Zambia has caused major problems with sulphur dioxide that the country must address (Adelzadeh, 2003). Africa needs to wake from its slumber because disregard for climate change and environmental degradation will hinder the continent's progress.

In addition, Africa must enable development by becoming more receptive to the idea of foreign aid, trade, and relationships. Foreign policies must favor simpler, more convenient commercial engagements. Products in Africa should be allowed to reach new markets, and the continent can open its markets to basic amenities that are not produced locally to meet African needs. These changes can improve the economy.

Africa should decentralize its economic responsibilities, treating both genders equally, before it can be a stakeholder in global discussions. Women in Africa currently constitute half of the population, but they contribute less than 39 percent of the Gross Domestic Product (GDP). This is the direct result of girls' having been marginalized and prevented from receiving an education or other opportunities (Raheem, 2021). Many cultures and societies still send women back to the kitchen or use them as free labor on the farm, affecting girl-child education and the aim of the UNESCO Strategy 2022–2029. Around 37 percent of women on the continent are subjected to domestic violence, although some countries have recorded an alarming 50 percent prevalence of gender violence (African Development Bank Group, 2016). Mutual respect and the observance of gender equality are the foundation of a healthy community that can achieve sustainable development. It means more hands available to push African development further, making it easier to meet the different goals of sustainable development. It also provides more human resources for the continent to draw on.

The continent requires united and coordinated efforts to actualize sustainable development and globalization. Collective effort must be made, and the African Union is the most appropriate body for championing this goal if it starts taking proactive actions. Plans and organizations like the New Partnership for Africa's Development (NEPAD) can contribute to the continent's development. Also, the African Union can establish multinational commissions and uphold continental imperatives, making first-hand suggestions and monitoring developmental projects.

There are many plans, aims, and intentions, like Agenda 2063, to achieve a better, more supportive society for Africans. But without support from focused leadership and purposeful governments, they will remain mere fantasies. African leaders in their respective countries must support and believe in globalization and the sustainable development agenda before they can build a consensus among African nations. Increased accountability will ensure developmental continuity and enduring solutions to the continent's problems. Though Africa has a long way to go before it fully embraces globalization and meets the 2030 SDGs,

progress is being made. The economies of African countries are growing gradually, with abundant natural resources to provide materials and financial capacity for sustainable development. These nations have the capacity to play more prominent roles in the global village.

In 2014, the African Union approved an investment of US$60 billion as part of the Program for Infrastructure Development in Africa (PIDA), although largely sponsored through foreign aid. The PIDA is expected to provide 70 percent of African countries with reliable access to electricity by 2040, up from 39 percent as of 2009. Improvements to the transportation sector are expected to deliver US$172 billion in efficiency gains. As of 2014, Africa had 60 percent of the world's arable land and a population projected to surpass that of China over a similar period. Africa's talented young population is a formidable reservoir of human resources, and their brilliant contributions to Artificial Intelligence (AI) and other technologies are hopes for a desirable future in Africa (Benedikter, 2019). The continent has enough in its arsenal to position itself as a forerunner in the global economy; if these resources are managed effectively, the 2030 targets should be achievable.

CONCLUSION: AFRICA IN A GLOBALIZED WORLD

The Africa we imagine as part of a globalized world will have a functional healthcare service accessible even to society's poorest members. Ideas shared through globalization will enable technological and scientific advancement, and Africa's position in a globalized world would place it on equal footing with its peers during international negotiations. Anything short of this means that Africa is not ready.

Africa maintains the poorest attitudes towards environmental issues and climate change, but Africans must apply conscious effort to take these concerns seriously. It is a responsibility that is owed not only to Africans but also to other citizens of the world. Many Africans migrate from the continent in search of health care because African medical services are currently in a dismal state. Access to health care is not available to everyone in society, and individuals do not have confidence in the limited options provided. Besides, medical personnel who could improve the continent's capacity for health care are fast leaving for other countries (Turner, 2011). This is an example of globalization, but only a part of it. The globalized future envisioned for the continent would draw talented individuals who would contribute their skills. Medical services in Africa should become an attractive option for non-Africans. If Africa is to live up to the potential of a fully globalized world, several measures must be implemented to stem the brain drain and attract foreign doctors.

The strength and development of twenty-first-century countries are determined by technological advancement across every sector of the economy. Open arms extended to embrace globalization have made ground-breaking

achievements in several African countries, particularly in the AI sector, where young Africans are a leading force. The growth rate, quantity, and quality of agricultural products have been improved by advanced biotechnology and farm management techniques, just as mechanical improvements have replaced the need for inefficient human labor. The application of technology has made strides toward alleviating poverty, and Africa could be positioned as a major supplier of homegrown cash crops distributed around the world to meet increasing demand. These are the benefits of Africa's technological advancement in agriculture. Commercially oriented innovation in each country encourages growth in every sector of the economy.

Globalization in Africa has encouraged different international companies to access the continent's commercial space, providing sophisticated technological innovation for many countries. Africa has imported educational models to improve its learning processes, and globalization has offered quality education to African students, placing them above others, especially in the global market. The proper positioning of Africa in the world economy will allow it to own technological innovations and adequately develop them. The global vision for the continent provides platforms to nurture technological advancement and innovative ideas. More investment in science and technology should be encouraged to provide adequate facilities for citizens to overcome their present limitations. Africa must not be the rural segment of the so-called "global village"; instead, it must match the efforts of other segments within that enormous village, ensuring that all its members are accommodated.

The desire for development has always inspired the aim of every reasonable government. With the present state of the continent, it is obvious that development needs to occur in various aspects of societies. More so, it is not that societies and their governments have not taken previous steps towards development before now, but the challenge has been that those developments have largely not been made with the ideology of sustainability. Sustainable Development growth tends to provide a developmental strategy that would be sustainable enough for the future. African nations may not have enough developed resources to achieve this, necessitating the need to seek foreign assistance. This need for adequate and effective resources to actualize development can be met through globalization and its endless opportunities. As a result, the SDGs, as well as globalization, might be giant steps towards actualizing African developmental dreams.

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16

Disembodied Globalization

Remaking Bodies, Unsettling Global and Personal Horizons

Paul James

ABSTRACT

How can debates about the future directions of globalization be best advanced, particularly those concerning the interchange of bodies and objects from refugees and tourists to body parts and viruses, when global relations are mediated through disembodying technologies from data platforms and digitalized surveillance to biomedicine? From the other side, how are we best to understand processes through which more embodied processes of globalization all tend to be managed, surveyed, and controlled through those more abstracted mechanisms of technological mediation? This chapter elaborates a methodologically consistent way of answering those questions. It investigates the tensions between these different forms of social interchange, arguing that disembodied globalization is now the dominant form of globalization, and is likely to be into the future. By exploring themes of embodiment, including human reproduction, sexual identity, vaccination, and genetic engineering, the chapter seeks to show how technoscientific intervention associated with ideologies of overcoming bodily constraint are remaking what it means to be human.

KEYWORDS

culture, embodiment, gestation, globalization, mediation, technology, technoscience, wombs

Even at the level of day-to-day local activities, embodied relations are being fundamentally transformed by abstracting processes that are increasingly globalized. Developments including the planetary reach of technoscience, cyber-capitalism, and communications technologies are increasingly framing how we live our

bodies. They enable phenomena as diverse as the global trade in body parts and the distribution of pharmaceuticals, including pandemic vaccines. The Global COVID crisis has brought this home, with all its disparate impact in different parts of the world. It seems that once again, a technoscientific fix has become necessary to mitigate the effects of a world turned upside down by the technologization and exploitation of planetary ecology—this time through zoonotic transfer intensified by climate change, deforestation, and the technologization of agriculture.

However, there is a less obvious reframing of our bodies going on. Biotechnologies have been steadily remaking the foundations of human procreation, gestation, and identity formation, albeit unevenly in different parts of the world. The chapter suggests that unless something is done self-reflexively and politically to slow down the dominance of technoscience in the context of what might be called "disembodied globalization," the present period of existential unsettling will extend voraciously into the immediate future. It will intensify and radically stretch us in different directions, fracturing our sense of ourselves and our relations to others and to nature.

How can we make such a claim? How can we appropriately use past and present vectors of globalization to inform our understanding of the future possibilities and probabilities of global interchange? The chapter projects the dominance of disembodied globalization as one of many future possibilities—"probable" only given its current power, and always dependent on human agency, aspirations, and desires. There is a profound difference between predicting or forecasting and projecting plausible, imagined, and probable future scenarios. Prediction tends to take the form of statistical tracking. It is the bane of bad futurism and underpins its tendency to get things wrong. Lines on a graph do not make the future, even if statistical analysis is a useful part of a broader analytical approach.

Without eschewing statistical analysis, the present approach works instead with the probable trajectories of dominant driving social forces. This chapter employs a "modes of practice" analysis as part of a larger *engaged theory* method (Steger & James, 2019). It is not controversial to say that in the world today, the dominant mode of production is cyber-capitalism, the dominant mode of exchange is commodity and financial exchange, the dominant mode of inquiry is scientific-analytic, and the dominant mode of organization is bureaucratic-corporate.[1] Out of this intersection of modes of practice has arisen a historically unique phenomenon that can be called *technoscience*, defined as the technologized instrumentalization of inquiry, linked to cyber-capitalism, with a driving tendency towards remaking natural and social life for the purpose of return on investment and "overcoming" the given historical limitations of being human. To be very clear, it is not the application of scientific principles to technological refinement that will be called into question—technoscience is much more than that. It is more pointedly the scientific-technological-capitalist triangle of disseverance, reconstitution, and exploitation of the basic foundations of life and matter on this planet.

The chapter begins by establishing the terms of a generalizing argument about disembodied globalization and its current and projected dominance. Underlying this argument is a normative proposition: unless people actively choose to live differently, the zooming dominance of disembodied relations, both globally and locally, will continue to remake our embodied relations to each other in ways that unsettle the condition of being human as we have known it. This methodological and political inquiry weaves through a discussion of a number of themes: human reproduction, sexual identity, vaccination, and genetic engineering. We now turn to defining key terms and processes.

DISEMBODIED GLOBALIZATION

Disembodied relations of connection, pressure, and impact are at the center of contemporary globalization. And it seems that this trend will intensify into the future, abstractly integrating the world through digital platforms and cruelly dividing it in terms of access, mobility, and wealth. This means that in relation to patterns of power, the bodies of people, from process workers in a *maquiladora* in Matamoras to Digicel flex-card resellers on the streets of Port Moresby, will continue to be secondary to the value-fluctuations and data-flows of the world's financial markets, currency-exchange systems, and communications platforms. The global COVID crisis has been a sharp test of the structural power of this continuing process of integrating the world at one level and dividing it at another. It was telling that the digital movement of images, signs, and data continued to intensify across the entire COVID period. This happened even while the movement of people became increasingly managed, surveilled, and curtailed. Even during the uncertain heights of the crisis when, for a short time, trade was dramatically declining and various pundits were *again* wrongly talking of the decline of globalization, the countertrends were startling. Communications and data-flow increased. This problematic projection seems to be a cyclical refrain that ignores the new dominant form of globalization. As one example of disembodied globalization under COVID, international Internet traffic doubled in 2020 on 2019 levels. Since then it has continued to rise at a steady rate (Altman & Bastian, 2021).

How did some economic commentators get it so wrong with their future projections? It was partly short-termism, partly desire to be dramatic, but also that they focused on a few discrete indicators with a skewed focus: the movement of people (embodied globalization) and trade figures (one aspect of object-related globalization), with some commentators adding in foreign direct investment (a small and particularly volatile aspect of disembodied globalization). The OECD data set on globalization, for example, is amazingly skewed, with all of its categories focusing on the activities of corporations and most of the data sets relating to trade (OECD, n.d.). It is no wonder that mainstream analyses can be so awry.

All of this confirms the need for an analytical framework that distinguishes levels of globalization in terms of the social form of the interrelation. In order

to be clear about current trajectories and future possibilities, it is important to know what we are actually talking about. Analytically at least, globalization can be divided into layers of lesser to more abstracted processes that extend and intensify social relations across world-space (Steger & James, 2019). *Embodied relations*, the first of these layers, are carried by individuals and groups moving in their personal capacity locally and across the planet—as refugees, migrants, researchers, tourists, and so on—engaging with others and stretching relations beyond immediate places. This becomes self-consciously globalized (with unintended but aggregated systematicity) as people's imaginative and active horizons stretch to the ends of the Earth. One aspect of the subjective side of this process is what Manfred Steger calls the rise of the global imaginary (Steger, 2008).

Institutionally extended relations are carried by people acting in their capacity as agents of states, corporations, and other institutions—from circulating military personnel to globe-trotting businesspeople. This second form *incorporates* the bodies of those who travel, but reframes their working practices as *agents* of something beyond themselves. Beyond being persons, they become *personnel*. That is, at one level, they are lifted out of the immediacies of their personal embodied relations to become representatives of something else.

With the third form, *object-extended relations*, engagement passes to objects circulating along global lines, from traded commodities and plastic particles to body parts and viruses. Again, even when these objects include human body parts—kidneys, sperm, and ova—they are abstracted from their prior embodiment. Intentionally or unintentionally, these objects extend and remake embodied meanings and relations across far-reaching space as people from body-parts sellers to organ recipients begin to think of the world as a global market of commodified possibilities for their own life-struggle.

And, finally, *disembodied relations* are those relations borne on the wings of immaterial things and processes such as electronic texts and encoded capital. It is this form of relation that in the contemporary world, and arguably into the foreseeable future, is remaking all the other forms. It constitutes the dominant formations of globalization.

In the engaged theory method, each of these forms is understood analytically as more materially abstract than prior levels. Equally importantly, history has taught us that over time more abstract levels tend to reframe and reconstitute those prior levels rather than replace them. Using this set of analytical distinctions (and not treating them as ideal types or stand-alone formations) allows us to understand the changing dominant forms of globalization without suggesting that any one of the other forms has been displaced or reduced to irrelevance. In practice, as the chapter will make clear, these different relational forms are increasingly bound up with each other. However, the connecting argument of the chapter is that, projecting from past and present patterns and trajectories, our most likely future is, firstly, the consolidating dominance of this disembodied form, secondly, the stretching of tensions between this and other forms, and thirdly, the contestation

of disjunctures of power as processes of disembodied relations encompass, dominate, and remake all others.

How can we talk of the dominance of disembodied globalization when the global movement of the bodies of people has become increasingly controversial and contested? It is certainly the case that the *negative* power of the movement of refugees and economic migrants has caused massive political upheaval in the world—and without a sea change in the politics of national borders, this seems almost certain to continue. The bodies of travelers potentially carrying different COVID strains have also had a negative power to disrupt globally, and this too will continue. However, a shift in perspective to examine the processes by which such movement is monitored, surveyed, and managed—in other words, to where power lies—makes it clear how much disembodied processes have come to reframe embodied mobility. States, international organizations, and a growing industry of subcontracted software companies now, for example, use sophisticated digital infrastructure to manage the bodies of those people who seek asylum and refuge across the world (Latonero & Kift, 2018). Thus, it is not the disappearance of bodies that we are talking about, but rather the reconstitution of embodied relations.

TECHNOSCIENCE AND THE UNSETTLING OF THE HUMAN CONDITION

In previous work, Manfred Steger and I have used the atomic bomb explosion in 1945 as a symbolic marker of the way in which abstracting processes, most pressingly through technoscientific interventions, have come to unsettle foundation senses and practices of human relations to others and to nature (James & Steger, 2021). We have argued that the Great Unsettling involves the capacity to take apart and reconstitute the basic conditions of life. In the case of the bomb, the splitting of the atom was cataclysmic in its consequences for the global reach of violence, opening the possibility of the end of the world as we know it.

In this essay, I want to use another marker of the Great Unsettling that relates more immediately to human embodiment—the discovery in 1953 of the double-helical structure of DNA, deoxyribonucleic acid. It was proclaimed as the "secret of life," but it involves the capacity to reconstitute what life means, including the meaning of a "normal" fetus. It is striking how closely the genetic-overcoming timeline follows the atomic-splitting timeline. In Eugene Thacker's words, with the coming together of genomic databases, DNA synthesizers and regenerative technologies, humans have on a global scale come to be "ontologically redefining the notion of biological 'life itself'" (Thacker, 2005). The discovery of DNA in this argument is a marker of an ontological shift within a matrix of other bio-interventions. Genetic engineering and associated activities such as in vitro fertilization now allow us to animate and reanimate the conditions of life, including its creation. A technological breakthrough such as CRISPR, marked by the

2020 Nobel Prize in Chemistry, has so quickly become normalized that it is now advertised for use by high school students in the classrooms for reengineering life-forms.[2] In the past, humans have controlled life-creation by political and cultural edicts or by the use of physical and herbal practices, but with the unbundling of the "secrets" of life, a new level of intervention, control, and exploitation has come into being.

Ulrich Beck calls this process "being God": "The genesis of human life is exposed to human intervention and creative will, but as a result also becomes the playground of the most diverse actors and interests scattered across the world" (Beck, 2016: 24). Beck takes the remaking of motherhood and birth made possible by technoscience as his way into the unsettling of planetary social life: "What used to be an intimate and almost 'sacred' act has metamorphosed into a global cosmopolitanized field of activities" (Beck, 2016: 22). Because there are substantial political similarities here with the argument of the present essay (but also profound theoretical divergences with some political implications), I will come back to his book *The Metamorphosis of the World* to sort out my perceived problems with his approach. I will also use Donna Haraway's work as a touchpoint along the way. Quite different from Beck, and as a precursor to the New Materialism, she tends to reduce objects as diverse as DNA, the fetus, and the bomb to being complex constructs of technoscience:

> Objects like the fetus, chip/computer, gene, race, ecosystem, brain, database, and bomb are stem cells of the technoscientific body. Each of these curious objects is a recent construct or material-semiotic "object of knowledge," forged by heterogeneous practices in the furnaces of technoscience. (Haraway, 1997: 129)

The difference here from the argument that I want to make is that, for all of the descriptive complexity of Haraway's analysis, the fetus and the stem cell are ontologically flattened as the hybrid creations of global technoscience. In the engaged theory method, this *is* the case at one level, but disjunctures remain as, across the world, mothers also continue to experience being pregnant in culturally diverse and embodied ways that palpitate despite the dominant scientizing mode. Whereas Haraway advocates "technoscientific liberty"—that is, controlling, inhabiting, and shaping the tools that remake us—this essay, by comparison, questions the whole technoscientific project of revealing, controlling, and overcoming.

However, first, the essay turns to describe some historical lineages that allow us to understand both the deep continuities and the profound discontinuities of the Great Unsettling. What Beck describes is a complete and utter transformation of the world, one that requires a new language. What this essay describes is rather a deeply troubling reconstitution of prior dominant forms that, at one level, carries forward old aspirations and imaginaries. Ironically, this disjuncture of subjective imaginaries and objective practices allows the proponents of a technologized post-human future to argue that what is happening is necessary and good. In other

words, I am suggesting that the unsettling of the world is more complicated than Beck described.

THE DISEMBODYING MISE-EN-SCÈNE OF HUMAN GESTATION

The technoscientific framing of the intimately embodied practice of gestation—becoming human—has, like most of these unsettling processes, a long-emerging history with significant countertrends. The medical framing of human gestation began as multiple lines of modernizing investigation. Two of these lines are particularly relevant to the longer story narrated here: the desire to *reveal* the unknown and the aspiration to *overcome* human procreative "deficiency."[3] Revealing the technicalities of the womb, a part of the process of overturning earlier traditional doctrines of forbidden knowledge (*quae supra nos, ea nihil ad nos*) was at first brutal, then normalized. In the early development of modern medicine from the sixteenth to the eighteenth centuries, it involved mapping the human body through anatomical exposures, often using flayed cadavers. For example, William Hunter's widely circulating obstetrical atlas, *Anatomy of the Human Gravid Uterus* (1774), depicts dismembered pregnant women who had died before giving birth. The women's legs and upper abdomen are cut off or covered in cloth to stage the uterus with minimal graphical distraction. Such atlases were part of a broader process of revealing the body in precise technical detail. At the same time, they were intended to diminish the prior hold of either idiosyncratic organic beliefs or cosmologically systematic doctrines about the unborn child (Sasson & Law, 2009). It took nearly two centuries for this technical imaginary to be generalized across the world beyond the emerging medical profession and to become the framing global conception of the gestation process. This occurred with contradictory effects.

It is a long way from Hunter's *Gravid Uterus* to the new mid-twentieth-century techniques for revealing the fetus, but there are continuities—and there are also increasing discontinuities that are unsettling identity and life. On one level, revealing the fetus has now been generalized and normalized as part of personal care. The ultrasound wand provides a good example because it is so apparently simple and innocuous. Invented in the 1950s, and extending to a globalizing market by the late 1970s,[4] it, at one level, returned the image of fetus to the woman who is undergoing the scanning procedure. She views the fetus growing in her own body as an intimate personal event. In one way, this *is* so. Events of mass-media revealing, such as *Life Magazine*'s 1965 front-cover image of a fetus, appear from the masses of letters and correspondence to have been received as such. However, as a number of feminist and other writers have documented, fetal-revealing events also became a culturally choregraphed and medically mediated process, repeated the world over, that disembodied women through regulated techniques, norms, and questions (Duden, 1993; Nicolson & Fleming, 2013). Do you want to know

the sex of your child? Does the baby have ten fingers and ten toes? With such questions the revealing is simultaneously enacted as an intimate personal "bonding" *and* used in abstracted diagnosis to determine whether the fetus is sufficiently "normal" to be taken to full term. Parents thus came to be produced as the arbiters of life and death.

Since its beginnings, imaging has taken a qualitative leap, now combining with a host of other tests that are available globally, including the use of maternal plasma to conduct cffDNA or cell-free fetal DNA testing. This kind of codification, now also linked to Artificial Intelligence systems, is called "noninvasive" prenatal testing (NIPT), as if by progressively taking the physicality of biomedical revealing out of contention, the personal bonding is simply being enhanced. However, stepping back from the immediacy of the process, Charis Thompson describes the management of the technical, legal, gendered, and identity-forming aspects of reproductive medicine as an unsettling *ontological choreography*:

> What might appear to be an undifferentiated hybrid mess is actually a deftly balanced coming together of things that are generally considered parts of different ontological orders (part of nature, part of the self, part of society). These elements have to be coordinated in highly staged ways so as to get on with the task at hand: producing parents, children, and everything that is needed for their recognition as such. Thus, for example, at specific moments a body part and surgical instruments must stand in a specific relationship, at other times a legal decision can disambiguate kinship in countless subsequent procedures, and at other times a bureaucratic accounting form can protect the sanctity of the human embryo or allow certain embryos to be discarded. (Thompson, 2005: 8)

What Thompson describes, common in the Global North and unevenly practiced across the South, is a process of taking apart the elements of reproductive embodiment and putting them back together in a biomedical model that fundamentally changes the meaning of embodied identity and kinship. Here, older modern processes of revealing and overcoming are overlaid by a biotechnical disembodied framing that fundamentally changes the meaning of our bodies (Kukla, 2004).

The intensifying aim to overcome embodied limitations has since generated a global industry in reproductive technology "assistance" with over eight million children born worldwide each year, most in the Global North. The fertility-services market was estimated in 2021 to be worth US$15.7 billion (Patrizio et al., 2022).[5] Using such economic data to track global industries is the usual mechanism for indicating global impact. Another approach would be to map the global journeys of reproductive tourism (Jönsson, 2017), the global movement of human gametes (Inhorn, 2011: 87–103), or the trade in body parts such as kidneys, corneas, and human hair (Lundin, 2015). Here our method would show how exploitative biocolonialism involves uneven and exploitative exchange across different forms of interrelation. But our search—paradoxically, given its earth-trembling impact—takes a subtler, less provable kind of work, tracing changes in the ontology of

reproduction. One way into understanding this change is through Barbara Duden's description of the 1965 moment of revealing the fetus as involving *a loss of horizon*, similar to seeing the Blue Planet floating in space:

> It has become very difficult for us today to realize, to sense, the horizon beyond which the not-yet was hidden for most of historical time. One of the most fundamental but least noted events in the second half of the twentieth century is the loss of horizon. We live somewhere between satellite TV, which knows no skyline, and the telephone, which allows us to reach beyond our line of vision to connect with any number we choose. It requires a special effort to remember there ever was a horizon, although it has only recently been erased. It was just yesterday that the whole earth suddenly "appeared" as the Blue Planet and we began to accept that fact that all would be exposed to recording equipment orbiting far above this Tower of Babel. I regard the fetus as one of the modern results of living without a horizon. (Duden, 2000)

As Donna Haraway writes, "The fetus and the planet Earth are sibling seed worlds in technoscience" (Haraway, 1997: 174). The difference here for Haraway, and distinct from the argument being made in this essay, is that this can be understood as just another horizon of embodiment. The levels method, however, clarifies what the framing process of disembodiment means. Bodies are not dematerialized, but they are socially reconstituted by a more abstract level of engagement, a relativizing (effectively horizonless) world of unsettled difference and identity (Caddick, 1986: 60–88). For example, even as early as *Life Magazine*'s 1965 front-cover image of a fetus and placenta floating in a black disembodied space, the mother's body had at one level been *objectively* relegated to the back-stage of medical imaging. In view for this world-changing set of photographs was just the amniotic sack on a black background. Objectively, it was depicted as an organism abstracted beyond the womb (*Life Magazine*, 1965). At the same time, subjectively, the photographs were received by the general public as intensely and intimately human. *Life*'s first print-run of eight million copies was sold out within days.

The global interest was overwhelming, with the article simultaneously published in the British *Sunday Times* and the French *Paris Match* (Fischer & Ville, 2009). The photographs were proclaimed as the first "portrait" of a living embryo *inside* its mother's womb, but the reality, not discussed at the time, was that many of the embryos pictured were no longer living; they were aborted organisms "staged" outside their mothers' wombs. Thus, in one sense, it was as if we were still in the brutal age of mechanical revealing, just more romantically presented. However, more deeply, we were witnessing the global remaking of human birth as a *revealed* and *chosen* right—not a veiled Other-given gift or a limited natural possibility, as it had previously been. Science now made *everything* possible, and over time the feminist critique (Franklin, Lury, & Stacey, 2000) largely lost its edge, routed by globalizing ideologies of liberation from embodied constraint.

A parallel history can be written about the eugenics movement, except that it quickly became globally prevalent in agriculture while taking much longer to

be normalized in human gestation and body-parts growing. In 1934 an English translation of Hermann Rohleder's 1921 German volume was published as *Test Tube Babies: A History of the Artificial Impregnation of Human Beings*. Despite the book's title evoking the much-later revolution in in vitro fertilization, Rohleder was describing a long-known mechanical process of impregnating woman with sperm from known men by physical but noncoital transfer. As with the process of revealing, the unsettling shift in *overcoming* human deficiencies occurred across the middle of the twentieth century. However, in this case it occurred first ideologically and then scientifically.

Across the early years of the century, the shift was slow. Charles B. Davenport's *Eugenics: The Science of Human Improvement by Better Breeding* (1911) was notable in linking plant development to human reproduction.[6] Despite (or perhaps because of) their scientific messiness and often racist and elitist incoherence, such books spread the eugenics movement worldwide. In 1925, Davenport became the first president of the International Federation of Eugenics Organizations. This was the context in which Aldous Huxley published his 1932 bestseller *Brave New World*. A couple of decades later, the Nazi eugenics experiments further slowed down the legitimacy of genetic engineering. Nevertheless, quietly in the background the science was proceeding—with new names such as "technologically assisted reproduction," "genetic screening," and "synthetic biology." The developments quickly compounded. In 1961, an Italian scientist successfully fertilized a human egg in a laboratory dish. In 1985 the world's first human gestational surrogacy took place with an American couple's fertilized embryo implanted successfully in another woman's womb. In 1996, a U.S. team, operating transnationally in Mexico to avoid national laws, facilitated the birth of a baby using the mitochondrial DNA from an anonymous donor and the egg and sperm of a Muslim Jordanian couple, thus producing the "world's first" biologically three-parent offspring. In 2021, "model" human embryos were created in Australia—in effect a form of cloning—to produce what they called "iBlastoids," bypassing the need for an egg cell and sperm cell. This development now tests the law that human blastocysts cannot be cultured beyond the development in "embryo" of what is called the "primitive streak." In 2022, David Bennett Sr. of the state of Maryland had his failing heart replaced by a genetically altered pig's heart; he lived for a month after the xenotransplant.

Before wrapping up this narrative, it is worth elaborating how this all links to the COVID crisis. The simple answer is that the new-generation mNRA and adenovirus vaccines also depend upon this disembodied reframing of human bodies. The AstraZeneca vaccine, for example, uses HEK-293, a human embryonic kidney cell-line derived from a fetus aborted in the early 1970s.[7] Using recombinant DNA technology, this cell-line was cloned across many generations to develop what is called a "vaccine factory" to help the vaccine to replicate (in this case derived from chimpanzee adenovirus Y25). HEK-293 is removed before the vaccine is manufactured,

thus completing the ideological circle of defense—"there are no fetal cells *in* our vaccine." The term *vaccine factory* is a parallel distancing trope, but, of course, removing the cell-line does not make any difference to the general ethical question, nor does it reverse the disembodied framing of embodied relations. Embryonic cell-lines are used in three main ways: first, in the design-and-development stage, to research how the vaccine will be constructed and produced; second, in the production stage, to manufacture the vaccine; and third, in the confirmation stage, to test the consequences of the vaccine. The mRNA COVID-19 vaccines produced by Pfizer and Moderna show that it was unnecessary at least in the first two stages. However, both companies used fetal cell-line HEK-293 in their confirmation stage. On their website, they say they are ethically sensitive to religious objections, but it is a rotten argument, much like the curate's egg. They are still compromised.

In brutal summary, a potential human life aborted by someone is used (instrumentalized) for technoscientific investigation, research, and production of the vaccine. However, the more general point is that the horizon of meaning has shifted so far that the process of abstraction now becomes its own defense. The proponents of mRNA vaccines say that the current fetal cell-line is thousands of generations removed from the original tissue, and the vaccines do not contain any tissue from a fetus. This is all factual, but we need to be clear what it means. It is now no longer an *ethical* defense in the prior humanist sense of the word, but rather a convenient and powerful post-truth. On the other side, the practice that sits behind the shifting horizon of ethics confirms the argument of this chapter that the abstraction of life (in this case, a fetal cell-line) is embedded in a globalizing technoscientific project. This project is one that defends itself by at once emphasizing its embodied therapeutic effects and suggesting that disembodying prior understanding of the limits of embodiment is positively necessary. Its effect, at least for those who know, is part of the unsettling of the relation between natural and created life, parts and wholes, embodiment and disembodiment. For others, it is just part of the confusing backdrop to the unnamed unsettling of the meaning of life. We need to get vaccinated, and this is what is available.

EVERYTHING HAS FUNDAMENTALLY CHANGED. WHERE DO WE GO FROM HERE?

In this conclusion to the chapter, I want to briefly round off the discussion by turning to two alternative ways of reading these changes. The first is the posthumanist approach (using Aaron Bastani as a key example), and the other is the "second modernity" approach (focusing on Ulrich Beck).

Aaron Bastani's recent book *Fully Automated Luxury Communism* (Bastani, 2019) serves as a salutary example, lest it be thought that the posthumanist (or

transhumanist) approach is restricted to right-wing techno-utopianism or post-structuralist excess. His approach turns on a problematic naturalizing of the current techno-scientific revolution—organic life has always been no more than DNA coding (abstraction as its own defense):

> Ultimately, we will encounter new possibilities in maintaining the biological systems of our planet, as well as feeding and healing our own bodies. And why not? After all, organic life is itself nothing more than encoded information, if a little more complex: there are four nucleobases in double-stranded DNA—C, G, A and T—rather than the binary code of 0s and 1s as with digital information. (Bastani, 2019: 39)

Given this assumed abstraction of embodiment, how do we establish a future global paradise? His answer is more technoscience: bring the digital revolution to bear on everything and abstract ourselves from nature, including our own nature, to solve all the world's problems. Along the way, he magically disaggregates technoscience from cyber-capitalism—despite their being inextricably intertwined across their current mutual histories. Bastani thus anticipates an automated world of wonder and ease, one "immeasurably better" than the current one. Communications technologies and Artificial Intelligence will supplant the necessity of most embodied human work. Renewable energy technologies will generate limitless sustainable power. Mining near-Earth asteroids will allow us to escape the earthly limits of resource depletion. Cellular agriculture and the production of synthetic meat will enable a massive relocation of food production to vertical postindustrial farming. Genetic engineering and preventative gene therapies will reprogram our bodies for strength and vitality, "potentially eliminating conditions which debilitate or kill millions of people a year" (Bastani, 2019: 157).[8] (He gives us a chapter on each of these claims.)

How will we achieve this "marvelous" abstracted disembodied world? Bastani's answer is an open Left democratic populism that fully embraces the new technologies. Acknowledging the "global scale of any response," he says, "is critical. Our ambitions must be Promethean because our technology is already making us gods—so we might as well get good at it" (Bastani 2019: 189). He thus revels in what he calls "the Third Disruption," the first being the human turn to agriculture and the second the Industrial Revolution. What will stop us, apart from new forms of Luddism? "One of the greatest barriers to such change," he says, "is the cult of globalism, whose default rhetoric is that the challenges we face are so profound that they can only be resolved through international coordination" (Bastani, 2019: 197). Bastani thus returns to an old Left rhetoric that says internationalism is good, but globalism and international coordination are bad. This line rolls out into incoherence as his required changes include the formation of an International Bank for Energy Prosperity taxing carbon production—a One-Planet tax—moving funds to the Global South for enabling technology transfer. One might think that

this will require some global cooperation and coordination to happen, but that is another question.

Ulrich Beck's world is just as frightening, except that he is nominally against it—against the technologizing that is making us gods. His concern is to move from a world of nations (bad) to a world of cosmopolitanism (good). The first methodological problem that Beck immediately encounters is that the issues that I have been describing have already been systematically (even if unevenly) globalized, particularly over the past half-century. If the global is good, how can the agents of globalization be such willing partners in the spread of these disruptive processes? This is compounded by a second problem: his framing argument is that everything across the world is in the process of utter transfiguration—"metamorphosis" towards cosmopolitanized spaces of action. For Beck, the language of transformation or change cannot handle such a process. It is completely epochal. "Metamorphosis is not social change, not transformation, not revolution and not crisis. It is the mode of changing human existence" (Beck, 2016: 20). However, because contradictorily it is simultaneously clear that everything has *not* (yet) changed—for example, as we are witnessing in the 2022 war in Ukraine, ideologies and practices of nationalism abound on both sides of the conflict, and bodies on the ground make a difference—his method has to twist and turn through some messy analytical maneuvers. These moves, I suggest, could be much more systematically handled through the engaged theory I have just outlined.

Beck first has to distinguish conceptually and arbitrarily between the routinized "cosmopolitanized spaces of action" that constitute everybody's lived reality and "cosmopolitanism," the normatively couched description of the good world that we are still to achieve. Second, he has to distinguish between "practice" and "action." Practices, he says, are routinized, including in cosmopolitanized spaces; actions are supposedly reflexive, reaching beyond that practical framing to cosmopolitan possibilities. For me, this remains an unresolved conceptual play of words rather than a clarifying series of analytical moves.

We can ask a parallel question of Beck that we asked of Bastani. How will his marvelous cosmopolitan world be achieved (and not just be routinized in the confusing cosmopolitanized spaces he describes)? A common global community of fate, he says, will occur as the "bads" of this metamorphosis confront us with the limits of older forms of human life and prejudice: "Muslim kidneys purify Christian blood. White racists breathe with the help of Black lungs. The blond manager sees the world with the eye of an African street child . . . The bodies of the rich are being transformed into skillful patchwork assemblages, those of the poor into one-eyed or one-kidneyed storehouses of spare parts" (Beck, 2016: 73). The bads of this process will, he says, force the realization of its emancipatory possibilities. The shock of catastrophe will bring about its own metamorphosis towards a positive "cosmopolitan horizon" (Beck, 2016: 123). The problem with this, as this chapter has been concerned to spell out, is that the horizon has already

shifted. Ideologically, abstraction and disembodied framing have become their own defense. And in practice, with this case of trade in body parts, technoscience is already working on developing more exploitable and dependable pools of resources that do not have such unfortunate biocolonizing connections. Stem-cell therapy, xenotransplantation, and bioengineered tissue products are, through CRSPR technologies, already beginning to replace raiding the Global South for organs and tissues. This is our present, and a possible future in relation to which we will need a very different politics from going with the global flow or hoping that catastrophe will bring new visibility and clarity about what should be done. Beck's book, written in 2016, is already out of date.

The engaged theory method outlined in this chapter handles this issue very differently. By using the analytical distinction of differently abstracted levels of interchange, meaning, and practice, it allows for understanding the tensions between continuity and discontinuity, global dominance and everyday lived reception. It shows how a dominant *and dominating* qualitative change, characterized by objectification, biomedical screening, and embodied overcoming, can be normalized in terms of older hopes and aspirations—the apparently unmediated act of welcoming a healthy baby into the world. It documents how technoscientific disembodiment is carried on the wings of globalization as a necessary but not sufficient condition of the power and constitutive reach of that new constellation of science-technology-capitalism. And above all, it hints at a way of responding to the unsettling that entails neither reveling in the Third Disruption (posthumanism) nor waiting for the routinized confusion of exploitative cosmopolitanized spaces to finally hit home (second-modernity reflexivity).

NOTES

1. See, for example, Ström (2020).

2. See www.lab-aids.com/blog/crispr-classroom, accessed March 14, 2022. CRISPR (Clustered Regularly Interspaced Short Palindromic Repeats).

3. Of course, there are other equally important lines of modernizing engagement than just the more mechanistic lines of revealing that I am emphasizing here. See for example, Porter (2003) on the romantics such as William Blake or a satirist such as Jonathan Swift.

4. Despite a brief decline in 2020 with the COVID crisis, Fortune Business Insights predicts that the global ultrasound equipment market will grow from $7.80 billion in 2021 to $12.93 billion in 2028 at a compound annual growth of 7.5 per cent. www.fortunebusinessinsights.com/industry-reports/ultrasound-equipment-market-100515, accessed June 7, 2023.

5. This is despite the declining live birth-rates through IVF procedures since the first decade of the 2000s (Gleicher, Kushnir, & Barad, 2019: 1–7).

6. See Witkowski & Inglis (2008), for a series of defenses of the technoscientific capacity to overcome human limits.

7. Here it is also worth noting that the distinction between *embryo* and *fetus* is a technical-medical one only. A fetus is defined as such by the length of time of living: nine weeks after conception.

8. It is worth noting that Bastani wrote this one year before COVID.

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17

Globalization and Visual Rhetoric

The Rise of a Global Media Order?

Tommaso Durante

ABSTRACT

In investigating and discussing the limitations and abstraction of "big data" quantitative measurement as a new capitalistic mode of operation that colonizes people's perception of the world, the study settles on a qualitative "small data" approach to understand change. Thus, by means of digital ethnographic fieldwork and an alternative *media aesthetics* framework, assisted by the method of global iconology, the chapter aims to reassess globalization as a *visual-ideological* phenomenon. Specifically, it investigates how the "reglobalization" of the world is mediated under present conditions of image domination. It does so by focusing on Instagram visual social media cultures and the role that transnational digital media elites play in the destabilization of the imagined multipolar world order we live in. In adding nuance to an understanding of how capitalism is restructured and mediated in the era of computer vision, machine learning, and pattern recognition algorithms, the study will also speculate on the imperialistic role transnational media corporations play and on the possibility that they may, or may not, contribute to the rise of a global media order.

KEYWORDS

data capitalism, globalization, global media order, Instagram, media aesthetics, visual digital rhetoric

We live in a highly mediatized and image-saturated world in which social networks, assisted by echo chambers and "neural network algorithms," are turned into the sites of contestation and threat to democracy and to democratic discourses. As a matter of fact, due to the digitalization of a large slice of existence and the massive use of electronic personal devices, a new world order is emerging: the

"global media order." The "global media order" is a new form of political world order made possible by the rise of a transnational technocratic elite and the constitution of a transnational public sphere that sees the pervasive role of media-tech giants embedded within the broader framework of the social, political, economic, and cultural structures of society and its ideological state apparatuses.

As a result of the dramatic digital capitalistic restructuration of the society, like in a slow-motion movie scene, we are experiencing the fall of Western neoliberal democracy under the weight of a system of production and consumption that is based on intellectual capital ("knowledge economy"), the commodification of data ("data capitalism"), and the development of visual technologies of surveillance and control. This chapter explores the strategic role and power that visual technologies, visuals, and visual rhetoric play in the destabilization of liberal democracies and the "reglobalization" of the multipolar world order in which we live.

The strength of social networks to mobilize people from the digital arena of the different materiality of cyberspace to the physicality of the public square, by means of a finger push or a tweet, clearly marks the move from the modern society of spectacle and simulation to one of digital capitalism. See for instance the attack on the symbol of American democracy, Capitol Hill in Washington, DC, on January 6, 2021 (Tan, Shin, & Rindler, 2021), and the one on the *Confederazione Generale Italiana del Lavoro* (CGIL, Italian General Confederation of Labour) in Rome, Italy, on October 11, 2021 (*Daily Mail*, 2021). This is just to offer you two similar cases. What is important to observe is that both at the U.S. Capitol (DeVega, 2021: see photo), the symbol of the American people and their government, the meeting place of the nation's legislature, and in Rome (Joly, 2021: see video) at the headquarter of the CGIL, the most representative organization of the national workers' union, when the insurrectionists came, they came with flags, signs, and symbols.

Some media theorists argue that media representations have become central to the web-centric society in which we live to the point that reality consists of neither more nor less than multilayered levels of representations. However, while for some media saturation is cause for celebration, for others the plethora of images and simultaneous information in which we are submerged has reached the point where "it exceeds the interpretative capacity of the subject" (Stevenson, 2002: 162). Indeed, concurring with philosopher and cultural theorist Jean Baudrillard (1994), multilayered saturation makes almost impossible any sort of real society or truthful account of the world that lies beneath all mediated images and representations.

In this study I am focusing on facts that are produced, circulated, and consumed by millions of people worldwide, and there is not much space to discuss concepts such as "real society" or "truth" in relation to media representations. What I know is that people in their everyday life communicate, exchange, and consume media, no matter if they are "true" or false, or the product of strategically planned disinformation or unintentional misinformation. For this reason, media representations need to be taken into due consideration and critically investigated, since they constitute the same horizon of signification of the "real society," which

is made up of "real people," and, under the present conditions of digital capitalism and reglobalization of the world, media and the continuous barrage of media images are an integral part of our everyday life and practices. What is more, they dominate the values and the ways we understand the world and our place in it.

Deeply aware that the revolution cannot be tweeted and that social networks cannot provide what social change has always required—strong tie-connection, attention, nurturing to keep progress going, and momentum—one can say for sure that revolution and social change can be ideologically and emotionally spread in order to mobilize people from the electronic square to the physical urban arena of the cities. In this respect, symbols can contribute to connect people and places to shared systems of ideas and beliefs, by contributing to the deep polarization of the political-ideological discourse. Furthermore, the interplay of exclusion and inclusion produced by capitalist globalization relies on a political force that balances economic exclusion with cultural-ideological inclusion.

In the aftermath of the world failure by the absence of a global governance system to curb the ongoing COVID-19 pandemic, the boldest media-tech giants like Apple, Microsoft, Google (Alphabet), and Facebook/Meta, to name just a few, increasingly acted as sovereigns and rival states. Ian Bremmer, Eurasia Group president, observes that while nation-states had been the primary drivers of global affairs for nearly four hundred years, in charge of conducting war and peace, providing public goods, writing and enforcing laws, and controlling flows of information, goods, services, and people, this no longer happens. Global media conglomerates and tech giants' influence will trigger plenty of backlash from leaders in the United States, China, and Europe, all of whom agree that they need to get tough on technology companies. "But," Bremmer argues, "don't expect any of these efforts to go all the way—in part because they lack the expertise and institutions to regulate Big Tech effectively and fear that overreaching could hamper innovation and growth" (Bremmer, 2021).

In *The Atlantic*, Adrienne LaFrance (2021) characterized Facebook as the largest autocracy on Earth. In her words, Mark Zuckerberg, unlike Einstein, did not dream up Facebook out of a sense of moral duty, or a zeal for world peace. This summer, the population of Zuckerberg's supranational regime reached 2.9 billion monthly active users, more humans than those who live in the world's two most populous nations—China and India—combined (LaFrance, 2021). Indeed, media-tech giants have become more and more powerful and ubiquitous in exercising a form of sovereignty over the digital space, though not exclusively, while also maintaining foreign relations and addressing shareholders, employees, users, and advertisers.

"Data capitalism," a new form of capitalism that commodifies data and uses "big data and algorithms as tools to concentrate and consolidate power in ways that dramatically increase inequality along lines of race, class, gender, and disability," assisted by Artificial Intelligence (AI) such as data mining and neural networks, represents the marketization of the whole existence, supported by digital

labor exploitation in order to maximize profits. As a result, they also contribute to destabilize liberal democracies, while at deep-subjective level are affecting people's social imaginaries and ideologies (Bremmer, 2021).

As Karl Marx's *Capital Volume I* ([1867] 1990) shows, in capitalism both the economic and the ideological dimensions play an important role in the formation of society and in the production of commodities. However, in this study I argue that capitalism and globalization commodities also have an aesthetic dimension that deeply contributes to deceive and manipulate humans. While the rise of data capitalism has revolutionized people's lives by turning personal data (the production of value) into a commodity, a source of profit for the few (the third-millennium oil, the new valuable resource), and inequality has never been higher, the emergence and consolidation of social networks have revolutionized the way in which people imagine their own existence, their social imaginaries and ideologies, and the ways in which they fit together. Digital technologies and new media have also changed people's lifestyles and the way in which they produce, spread, and consume ideas.

Fast-moving technological changes are affecting both liberal democracies and, at deep-subjective level, people's mindset worldwide. Digitization has also highlighted the fraught relationship between its benefits, such as ease of access to everything from everywhere and provision of services, with the risk of privacy and data-protection principles being undermined or eroded over time, particularly with such large and sensitive big data sets. Indeed, it also contributed to erode the gap between *us*, analog human beings—we are analog devices following biological modes of operation—and *them*, computational technologies operated and owned by the global media-tech giants: a capitalistic (digital) mode of operation in the hands of a technocratic elite-group that suggests that we can all flourish in the "Exponential Age" of *flows* and abstracted *timeless time* of the networked society. This well explains the ways in which the largest and most powerful media-tech corporations in the world wield power by means of "big data."[1]

According to *Oracle* (2021), "big data" is made up by the three Vs: volume, velocity, and variety, which in other words means that big data contains a greater variety of data, with increasing volumes and greater velocity. Anyway, there are some limitations to the use of big data analytics. For instance, as Ciklum (2017) observes, data analysts use big data to tease out correlation: when one variable is linked to another. However, not all these correlations are substantial or meaningful. Also, it is up to the user to figure out which questions are meaningful. What is more, because much of the data you need analyzed lies behind a firewall or on a private cloud, it takes technical know-how and money to efficiently get this data to an analytics team. Lastly, sometimes the tools we use to gather big data sets are imprecise. For example, Google is famous for its tweaks and updates that change the search experience in countless ways; the results of a search on one day will likely be different from those on another day. If you were using Google search to

generate data sets, and these data sets changed often, then the correlations you would derive would change, too. Therefore, big data is questionable in terms of the nature of its quality and trust: any values missing from the data, any inconsistencies and/or errors existing in the data, any duplicates or outliers in the data, any normalization or other transformation of the data (Ciklum, 2017; Oracle, 2021).

Thus, it can be argued that the emergence of data capitalism as a new mode of operation and its AI apparatuses made up of deep machine learning, computer vision, and neural networking algorithms combined with visual digital technologies and cloud-based voice services are colonizing at deep-subjective level people's social imaginaries and ideologies, while contributing to what some scholars define as the "reglobalization" of the world.[2] As previously acknowledged, rapid technological development is contributing to changes in norms and values, with global media-tech giants forming their own transnational apparatuses of economies and cultures within and across existing nation-states. As a matter of fact, globalization, as we have known it for the past decades, seems to be morphologically changing its face while still embodying an extreme residual neoliberal attitude.

DIGITAL METHODS TO RESEARCH THE GLOBAL

To research the global in the different materiality of cyberspace, we need a digital and tailored methodology that includes digital methods. Digital methods are research strategies that can follow the evolving methods of the medium, in this case Instagram (Rogers, 2019). Among the available digital methods, visual ethnography is the one I consider most appropriate for my approach. Anthropologist Sarah Pink observes that visual ethnography is not a single stage in research. Rather, it is an embedded dialogical state in which theory, practice, and engagement with people in the real world happens. That being the case, the academic meanings that ethnographers give to photography are constituted in relation to fieldwork sites and encounters, disciplinary priorities, other stakeholders, methodological and theoretical approaches, and interventional agendas. We also cannot avoid bringing to these meanings our own personal experiences, memories, and imaginations. This contingency of meaning is inevitable (Pink, 2021: 150–69). Thus, following Pink and Rogers' arguments, it can be said that for this study I am turning Instagram into an epistemological machine, since "digital methods can be considered the deployment of online tools and data for the purposes of social medium research" (Rogers, 2019: 7).

However, while I am using visual ethnography as a practice and an approach in its relationship to the sensory and the digital, to better understand the role that visual rhetoric plays in digital environments and at deep-subjective level, I am also using the method and approach of critical visual analysis of "global iconology" to develop an in-depth reflexive understanding of how visuals participate in the production of ethnographic knowledge and academic understanding of change in the

global age of data capitalism. Global iconology will assist to better understand how the prereflexive dimension of the social imaginary is turned into the symbolic and social construction of people's common sense of "the global" in their everyday life. To research the social app/network, I opened a private account on Instagram. This was necessary to research the app, due to the participatory and interactive nature of social media and the need of my investigation to take the form of social observing and listening to the contents and information produced online to uncover trends and insights that emerge from those data.[3]

THE SYMBOLIC SYSTEM OF INSTAGRAM

The search for the Instagram dataset on Google Scholar on January 18, 2022, in only 0.04 seconds returned about 59,400 conference papers and academic articles. A significant proportion of these publications and papers are from computer science and media studies. They have analyzed various aspects of the Instagram platform and its multiple users by means of large samples of data sets (photos) and their metadata. The attention to the social network clearly explains its importance. However, by contrast, in this study I will focus on "small data." If the term *big data* is about machines and quantitative methodology, *small data* is about people and qualitative methodology, which means that the data are accessible, informative, and actionable (Pollock, 2013).

I chose Instagram because, as a symbolic system, it was able to visually reimagine the relationship between human representation and Artificial Intelligence, mind and machine, and, specifically, because it was able, for the good and for the bad, to produce a global Instagrammar aesthetics. This technologically manipulated aesthetics also affects people who are not members of the digital community or who are simple followers, and for this reason it requires more attention. As a matter of fact, Instagram was able to combine in one single app/platform/medium a larger real-life experience as no other social media was able so far to achieve. Camera, photo paper, a darkroom, exhibition spaces such as private and public galleries, and publication venues such as magazines exist together in one app of people's smartphones (Manovich, 2017).

Beyond the technological, aesthetic, and ideological rupture represented by being the first dedicated visual social media allowing the production exchange and consumption of images, as previously already acknowledged, Instagram was able to establish a new global aesthetic: the "global Instagrammatic aesthetics (visual culture of social media)." By the term *global Instagrammatic aesthetics*, I mean the underlying approach, ideologies, and system of values that lead people (users and followers of the social network) to actively work on a continuous redefinition of their *digital self-branding*, which in other words means the ways in which they make use of images, colors, fonts, logos, layouts, tones, and filters to produce their *visual identity* on the digital set of their social relations that connects people through the

World Wide Web (social web). Thus, it can be said that from the birth of Instagram (October 6, 2010), with respect to "personal self-branding" (a uniform public image marketing strategy) and "visual rhetoric," no matter if in the digital space of the Internet or in the physical world, nothing is anymore the same as it was before.

This study understands "visual rhetoric" as the study of visual communication and the investigation of how images work. In doing so, it also considers the ideological function of discourse as an interest of rhetoric, both in the stage of production and in that one of circulation and consumption. Visual rhetoric, the study of visual imagery within the discipline of rhetoric, is founded on its visual transdisciplinary nature. Specifically, I understand visual rhetoric as the means by which "visuals"—any types of visual imagery, still or moving—can be used by means of communication to shape people's minds, lifestyles, opinions, and beliefs. Therefore, to study visual rhetoric, it is necessary to ask the question: "How do images act rhetorically upon viewers?" (Hill & Helmes, 2004). Interestingly, to assist their users and followers with a stronger real-life experience, and to fight the dominance of YouTube and Tick Tock in the visual social media experience, currently Instagram has opened to the moving image: the video (Mosseri, 2021). This will help to turn the social app into the *State of Visual Commerce.*

Instagram, owned by Facebook/Meta, celebrated its twelfth birthday in 2022; Instagram is the seventh most visited website in the world, the ninth most Googled search term, and the second most downloaded app in the world. A total of 1.22 billion people use Instagram each month; it is Gen Z's favorite social platform. Instagram's audience is split fairly evenly between males and females. India has the most Instagram users in the world; 59 percent of U.S. adults use Instagram daily (McLachlan, 2022).

THE DIGITAL DIMENSION OF THE MILLENNIAL'S DREAM

To provide one example of how image acts rhetorically upon viewers (users and followers), I identified a personality who works well as a transnational case. I chose to explore the millennial American socialite and media personality Kim Kardashian's Instagram account (@kimkardashian). Although media are globally saturated with images of the American pop culture icon, I selected her Instagram account as a case study because it well condenses the *global Instagrammatic aesthetics* this study argues about. Assisted by the mobile app / social platform and the use of digital tools of photographic/visual aesthetic manipulation, Kim was able to turn herself from a "scandalous" millennial—a person reaching young adulthood in the early twenty-first century—into a global logo-brand and, more broadly, into an aesthetic paradigm shift: Kardashian Life (@kardashianlife). *Time Magazine* ranked the American socialite among its one hundred most influential people in 2021 (*Time*, 2021). She is currently one of the top fashion icons of the Hollywood industry,

and the UK-based start-up *Hopper HQ*—the Instagram planning and scheduling tool—*Official Instagram Richlist* (2018–21) ranked her number six on the list with 278 million followers (Social Tracker, n.d.). In January 2022, one of her Instagram posts was worth $1,419,000. Furthermore, when in February 2021 America's self-made woman filed for divorce from husband Kanye West, her real-time net worth according to *Forbes* on September 06, 2022, was $1.8 billion. Interestingly, with wall of fame and in the spare time, the global pop icon, core product of digital capitalism, currently seems also politically engaged (Instagrammar politics?), occasionally advocating for criminal justice reform, gun safety, and cancer causes.

Celebrity culture is an inescapable part of our media landscape and our everyday lives. Celebrity and fame could perhaps be also perceived as a new kind of contemporary religion for our culture (Douglas & McDonnell, 2019). The late Barbara Walters, an American broadcast journalist, author, and television personality, in an interview with the Kardashians on Walters's annual "10 Most Fascinating People" special in 2011, asked them, "You don't really act, you don't sing, you don't dance, you don't have any—forgive me—any talent!" Kim's answer was: "I think it's more of a challenge for you to go on a reality show and get people to fall in love with you for being you, so there is definitely a lot more pressure, I think, for being famous for being ourselves" (Marcus, 2011). It may be that Kim Kardashian has no particular skills or talent, as Walters stated in her viral interview (larfoutloudLOL, 2011). However, it can be argued that Kim was able to master her self-branding better than many entrepreneurs and marketing strategists (Blurter of brilliance, 2021).[4]

What we can learn from Kim Kardashian's Instagram case study is that conveying your brand's personality by means of strategic marketing in the form of a *visual-ideological identity* makes you look more professional and reliable. This will also give you a status, while helping your followers to instantly recognize your brand contents when they appear on the Instagram global mall, rather than in the shop in your neighborhood. What is more, self-branding assists in building loyalty and converting visitors to your profile into lifelong followers, which in other words means that by symbolic capitalization you can maximize your profits in the real world: a life insurance. However, it is worth observing that the extreme concentration of wealth, influence, and attention is a fundamental condition in the rising inequality affecting two-thirds of the globe (UNDESA, 2020).

It is not surprising that, in exploring the power of *aisthēsis* (sensation) in relation to the art of persuasion (rhetoric) and by focusing on the networked images of Kim Kardashian on Instagram, we can acknowledge that images, no matter if networked (digital) or analogue, capture moments that are *seldom comprehensive or entirely representative*, while text can provide broader and deeper context, as this study suggests. However, it can be argued that, in a world dominated by images, many more people see the pictures associated with a social network or news reports without ever reading the corresponding captions or the accompanying articles that provide the context for the images, while the *asymmetric visibility* of users that favors celebrities, influential institutions, and media-tech corporations

contributes to the global economic rising inequality and countries' asymmetric power relations.

Along with other participatory media, Instagram suggests, supports, and sustains the uses of *visual rhetoric* in order to allow businesses to effectively maximize the use of their platform and, in turn, maximize theirs and Instagram's profits. Visual rhetoric is the way rhetors use *symbolic images* to communicate, create meaning, make arguments, and persuade. An image as rhetorical device becomes a reality in itself. Corporations use visual rhetoric and the ability to persuade users and followers to buy their "products." Because Instagram is a visually based creative platform, corporations and global conglomerates make use of strategic communication by means of visual rhetoric practices for their social media posts to cater to their Instagram target audience and market globally. Although the connection between *rhetoric* (persuasion) and *aisthēsis* (sensation) is as ancient as human history (the Romans teach), rhetoric still can be used in a very powerful way due to the unchanged nature of human beings. The scholar of rhetoric Kenneth Burke observes that, wherever there is persuasion, there is rhetoric, and wherever there is "meaning," there is "persuasion" (Burke, 1969: 169–73).

In her book *No Filter*, Bloomberg social media expert Sarah Frier observes that it is perhaps enjoyable to think that bikini shots and Brazilian bum lifts are Instagram's biggest impact on society. However, the reality is much more complex and "people still know the way to win at Instagram is to do something visually arresting [. . .] I don't think that's going to go away." From the moment Instagram introduced reality-adjusting filters, it changed the way people, not only followers, present their selves to the world. A further striking observation in *No Filter* is that Instagram wanted to build a community that valued art and creativity. Instead, "they built a mall" (Frier, 2020). While much is made of beautiful influencers pushing diet pills and luxury travel on the app, *everyone on Instagram is selling their life in some way*. Nevertheless, whether you use the app or not, Instagram has shaped people's mindset, and for these reasons we must take it into due consideration. As a matter of fact, Instagram's dominance of the state of visual order in the global age of data capitalism acts as a lens on the whole of liberal democracies, though not exclusively, highlighting on the one hand our conflicting and anxious relationship with technology, on the other hand the battle between global media-tech giants for their most valuable commodity: people's attention.

CONCLUDING REMARKS: TOWARDS A GLOBAL MEDIA ORDER?

Moving towards an image-dominated society, visual technologies will no longer be an occasional issue of national security. Instead, they will be placed at the core of the web-centric society to operate 24/7 in order to surveil and control people's ordinary everyday life. What future generations will experience is a *global digital panopticon* made up by global media-tech giants to turn the complex society in

which we live into a web-centric society of surveillance and control under conditions of a global media order—something more sophisticated and violent, paradoxically "invisible," than the reality we are experiencing now.

The global media order will emerge from inside the destabilized modern self-contained nation-state that is still at the core of current processes of reglobalization, by the same economic, political, and cultural forces. Ideologically fragmented by the transnational spread of nationalistic ideologies that are connected to the system of values and beliefs of populism and dominated by images, the current fragile multipolar world we live in will crash. This will occur due to the deep restructuration of the economic formation of capitalism into data capitalism, and by means of a *deep-technological mediatization* of people's daily life.

Thus, it can be argued that, as a result of the digital restructuration of society by data capitalism and the use of big data as a new mode of capitalistic operation, in the context of an image-dominated world, media-tech giants will definitively contribute to colonizing our whole existence. As a matter of fact, our future in the global age of data capitalism and decentralized technologies (DeFi) will be built on the Ethereum blockchain—a decentralized blockchain platform. Currently, the rise of data capitalism and the digitization of our whole existence have already developed widespread concern, both in academic and public media discourse, regarding the dominance of social network echo chambers. At the same time, the function and power of visual intelligence systems—a computer science discipline that trains machines to make sense of visual images and visual data the same way people do—and of visuality are underestimated, if not disregarded.

Beyond people's analog nostalgia, which can be considered as *modern antiques*, the transition to digital is marked by the downgrading of the human condition in the human-technology relationship. Therefore, we must confront digitality at subjective-objective level and at every scale of the global, which is "possible only when we recognize that our analogue essence has its real home only in nature."[5] Still, to confront digitality, the variables to be analyzed are too many, even when we use big data and Artificial Intelligence. What is more, under present economic conditions, controlling information means controlling the world. Just think about the influence that Facebook's hidden algorithm, which prioritized the corporate business model above all other objectives, has had and still has on our politics.

Since capitalistic restructuration as well as global processes are in constant flux, in the era of planetary corporate capitalism, global Instagrammar politics and neural networks, without an appropriate confrontation/resistance at every scale of the global, fundamental things like power remain almost the same, this time in the hands of an elite group of authoritarian technocrats. What is concerning under data capitalism is the power of social networks and the fact that any resistance, fight, or protest, including the academic exercises of critique, are turned into stimulus to the continuous adjustments of the capitalist system, the same thing

these movements often intend to fight. This is because digital capitalism is able to devour everything that is produced, circulated, and consumed, in the name of the neoliberal marketized nature of society in which we live. Like with the symbol of Ouroboros—the snake or serpent eating its own tail, variously signifying infinity and the cycle of birth and death—capitalism is cannibalizing itself by turning our whole existence into a commodity ready to be consumed and, as a result, reificated. Thus, the love and hate of capitalism, the critique of the system, is turned into the form that structures the *visual-ideological* (dominant) discourse, which according to Michel Foucault is intimately intertwined with relations of power (Foucault, 1980).

There is the high risk that social lives are separated from us and stored in servers owned and controlled by the technocracy represented by media-tech giants and that this will cause "algorithmic alienation" of users' lives. A new technocratic world order and aesthetic regime of the global based on the marketization, surveillance, and control of people's whole existence.[6] A context in which the control of the wealth of the world will be in the hands of a bunch of technocrat billionaires who—right now—are designing humanity's future.

NOTES

1. For arguments in "favor" or "failure" of "digitality," see Azeem (2021). This passionate work by a technology analyst offers a set of policy solutions that can prevent the growing "exponential gap" from fragmenting, weakening, or even destroying our societies. This is a manifesto over the widening gap between AI, automation, and big data—and our ability to deal with its effects. The body of work by Fuchs (2014, 2021) (*Digital Capitalism* is volume 3 of a dedicated series) illuminates how digital capitalist society's economy, politics, and culture work and interact. In Hassan (2020), the media theorist suggests that "digitality" is a condition and not an ideology of time and space, stressing that David Harvey's time-space compression takes on new features including those of "outward" and "inward" globalization and the commodification of all spheres of existence. In doing so, he recognizes digitality as a new form of reality and the urgent need to assert more democratic control over it. In Negroponte (1995), the media theorist's optimism is disarming in its empowerment of *being digital*. In order to understand the importance of "big data" and why you cannot manage something if you cannot measure it, see McAfee & Brynjolfsson (2012). I also suggest reading a provocative piece, by the editor of *Wired*, Chris Anderson (2008), titled "The End of Theory." Anderson was referring to the ways computers, algorithms, and big data can potentially generate more insightful, useful, accurate, or true results than specialists who traditionally craft targeted hypotheses and research strategies. For an argument in favor of why theory matters even more in the Global Age of "big data," see Wise & Shaffer (2015).
2. For comprehensive studies on "reglobalization," see Benedikter, Gruber, & Kofler (2022) and Steger & James (2019: 199).
3. For more information, see Durante (n.d., 2021, 2022).
4. Kim Kardashian's Instagram page is at www.instagram.com/kimkardashian/.
5. On the issue of the transition to digitality as "analog" human beings see Hassan (2022) and Hassan & Sutherland (2017: 225). On the topic of "blockchain" see Casey & Vigna (2019).
6. On the topic of "algorithmic alienation," see Andrejevic (2014) and Fuchs (2022: 207–8).

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18

Globalization, the COVID Pandemic, and the Viral Visions for Global Futures

Nevzat Soguk

ABSTRACT

This chapter explores contradictory dynamics of the recent, current, and future prospects of globalization revealed by the COVID pandemic of 2019–22. Situating the analysis in the COVID-19 pandemic world, it examines how the COVID-driven process shaped/shifted ideals about community, belonging, and security organized around the citizen/nation/state trio in a globalized international system. It contends that the COVID pandemic may have stirred or animated simultaneously centrifugal nationalisms within the Western world and the richer countries, resulting in neopopulist policies and protectionist measures. It also argues that these same policies, exposing the structural precarities around the world, particularly acutely in the Global South, will likely fuel centripetal migrations across the globe. In the end, however, the chapter argues, both dynamics will likely further globalization, for both are a priori bound up with (and within) the already globalized productive infrastructure, composed of digital and knowledge industries, manufacturing and transportation sectors, and trade and finance institutions. Ultimately, it suggests that globalization is here to stay, though taking on different forms as evinced during the COVID-19 pandemic.

KEYWORDS

COVID-19, deglobalization, globalization, interdependence, precarity, state

Global responses to the COVID-19 pandemic of 2019–22 revealed two contradictory dynamics at work in contemporary globalization. On the one hand, many countries have scrambled to enact COVID-driven policies and practices that chip away from social, political, and even economic fluidity and interconnectedness in the world in the form of protectionist health measures, vaccine hoarding, and

travel restrictions. Some observers see such moves as evidence of deglobalizing tendencies. On the other hand, and paradoxically, the efficacy of many of the policies and practices is predicated upon the seamless work of the extant global economic infrastructure in manufacturing, transportation, and distribution. For example, some of the protectionist countries relied on India, a major vaccine manufacturer, for their vaccine supplies. Further, the COVID-driven nationalist practices in all countries relied on "knowledge globalization" (anchoring vaccine efforts). The same practices also exposed the structural vulnerabilities/precarities in many countries around the world in providing for their citizens—particularly acutely in the Global South.

In this chapter, I explore what these contradictory dynamics and paradoxical forces revealed about the current state and future prospects of globalization. Situating my analysis in the COVID-19 pandemic world, I examine how the COVID-driven processes have shaped/shifted ideals about community, belonging, and security organized around the citizen/nation/state triad in a globalized international system. I contend that the COVID pandemic is likely to stir or animate simultaneously centrifugal nationalisms (within the First World) and centripetal migrations (from the Global South). In the end, however, both dynamics, like the paradoxical dynamics I alluded to at the onset, will likely further globalization, for both are a priori bound up with (and within) the already globalized productive infrastructure, whether digital and knowledge industries or manufacturing or transportation sectors. Ultimately, I suggest that globalization is here to stay, though taking on different forms as evinced during the COVID-19 pandemic.

COVID-19 AND THE VIRAL ENDS OF GLOBALIZATION: A LITTLE VIRUS THAT COULD!

The COVID-19 epidemic catalyzed a crucial shift in thinking globally across the world's countries. Some global flows present risks beyond ordinary challenges that rise to the level of security risk with implications for worldwide social and economic stability. COVID-19 quickly rose to such a level around the world, but not with an equal measure of alarm universally across the world's countries. While the virus traveled at speeds equal to speeds of circulation of human matters in planetary circuits, its detection across the world varied from region to region or from country to country. Countries sitting at the nexus of global circulation detected the virus earlier in part due to their position in global circuits, and in part they had the resources to do so. France, Italy, Great Britain, Germany, and the United States were among those countries. At varying degrees of speed, these countries realized that the virus presented an uncertain future. But once the realization was in place, they moved swiftly to curb the flows of things, first the flow of international travel, then the mobility of citizens within, and, finally and unintentionally, the

flow of trade, that is, the flow of goods and commodities across the world. Other countries followed suit, first in the rest of Europe, East Asia, and also Australia and New Zealand, then in the rest of the world, such as in South America, where the responses imitated those of the richer countries of the world without being unable to muster similar resources of containment and alleviation. Within six months to a year, “the pandemic had caused the largest and fastest decline in international flows—including trade, foreign direct investment, and international travel—in modern history” (Altman, 2020). Such a snow-balling effect, curtailing if not decimating global flows so rapidly, was undesirable but not unexpected given the globalized capitalist infrastructure (of extraction, production, and supply chains) conditioning global interconnectedness and the networks of interdependence, more intense and coordinated, shaping the contemporary world.

Additionally, participants to the global knowledge economy, which permeated traditional fields of economic and political interactions, were suddenly thrown into a turmoil in terms of which “masters” (countries, companies, communities) to serve, and how and where, as they came under contradictory neopopulist as well as global, even cosmopolitan, pressures. Scientists, research centers, institutes, and universities situated around the global funding circuits shuffled their positions in pursuit of profitable partners. BioNTech, a German biotechnology company run by a Turkish-born scientist-couple, entered into a joint venture with the American pharma giant Pfizer in search of a vaccine. Astra-Zeneca, a British-Swedish multinational pharmaceutical and biotechnology company, teamed up with Oxford University. Russia and China had their own ventures with varying degrees of secrecy and success, as other countries scrambled to protect their own populations and institutions by isolation. The more they isolated, the more political and economic disjunctures in the global system were revealed. The COVID pandemic exposed or revealed many of these disjunctures. It revealed that globalization had not been a panacea for the world’s varied problems; that its promises of democratization of life across the planet had never fully materialized; and that the economic miracles foretold on its behalf had created untold riches for a few, uplifted many out of absolute poverty, but also either failed to free the broader masses from the extant precarities or created new forms of vulnerabilities in their lives, particularly through labor flexibilization policies.

Paradoxically, the COVID pandemic’s revelations showed that at stake was not the overall global capital-driven system’s strategic stability and survival, but rather its discursive internal constitution that served some at the expense of others. It revealed that countries and communities long taught to dictate the trajectories of globalization were themselves subject to the intended or unintended consequences of choices made and paths established. It became further clear that even their privileges within the system are precariously dependent on the complex interdependency that they helped to put in place but over which they now have limited or graduated control. For example, when medical-grade personal

protective equipment became scarce, thus most sought after, much of the world realized that only a few countries were designated by complex interdependence to make them. Similarly, the intensive care units (ICUs), specifically the parts, were increasingly up to China and India to supply even though the know-how was supplied to China globally. Especially in the "Western world," the realization of this vulnerability to China or India or several other distant countries added fuel to the already raging neopopulist imagination dreaming of idealized autarchic societies and calling for deglobalization.

The COVID-19 virus was further revelatory beyond the West: it revealed that the complex interdependence had created a globalization through old and new hierarchies, rather than flattening hierarchies, as was promised in early pronouncements on behalf of globalization. Globalization had reached into the lives of people everywhere in the "Rest" beyond the "West," but only to recalibrate their protracted subordination within the system. Ordinary peoples in some of the chronically exploited African countries can attest to their status. In countries like the Democratic Republic of the Congo, formal citizenship offers no meaningful rights and protections to citizens, but various modalities of subjection. Rare-earth minerals spirited out of the Congo through networks of globalization tell such a story of recalibration of subjection through desolation of their earth and abandonment of citizen bodies. Not even a faint trace of lives unearthing the minerals for the gods of globalization is duly accounted for in globalization tales. By virtue of their operating (ordering) logic anchored in capital accumulation and value extraction, globalizing agents, institutions, and structures intensified and deepened unequal exchanges regardless of which dominant actor was deriving the process. That was not the rhetorical promise of globalization when announced in the 1970s and 1980s, but largely became its reality in places like the Congo.

Impoverished communities not only in Africa but also in Asia and the Americas were made to realize once again that they are not any priority even if the strategically positioned few in their communities benefit from globally orchestrated structures arrangements. The Democratic Republic of the Congo's president Laurent Kabila, along with his cronies, siphoned off billions of dollars, not unlike the former president cum dictator Mobutu Sese Soko, who went into exile with his loot of billions stashed in bank accounts of the global finance networks. Now the Chinese companies are said to own many of the Congo's mineral mines, to the chagrin of Americans who used to be the orchestrators of wealth and poverty. Against this background of these enduring hierarchies highlighted by the viral disruption of COVID, the scramble by individual countries to "self-help" at any expense—closure of borders, lockdowns, hoarding of PPEs (personal protective equipment), pirating of ICUs (intensive care units), international monopolizing and prepurchasing of vaccine productions—further exposed the soft underbelly of affirmative pronouncements on globalization of and for humanity. A single virus

traveling globally had not only disrupted the mechanics of globalization but also shown fractures feeding on localization (and nationalization) of life.

DEGLOBALIZATION OR BUST?

Given all these revelations, it was not long before predictions about retreat or the demise of globalization were proliferating. Centripetal forces in the West and centrifugal pressures in the Global South appeared to add fuel to predictions. The Chatham House captured the consensus of those voices as to what is meant by deglobalization: "Deglobalization is a movement towards a less connected world, characterized by powerful nation states, local solutions, and border controls rather than global institutions, treaties, and free movement" (Kornprobst & Wallace, 2021). According to Irwin (2020), a process that was already underway was made more visible by the pandemic.

> The COVID-19 pandemic is driving the world economy to retreat from global economic integration. Policymakers and business leaders are now questioning whether global supply chains have been stretched too far. In an environment where alliances are uncertain and international cooperation is absent, they are also asking whether they should reduce their economic interdependence. National security and public health concerns are providing new rationales for protectionism, especially for medical gear and food, and an emphasis on domestic sourcing.

There is widespread agreement on this point among the observers. Some form of what might be called "deglobalization" has been occurring since the 2008 Global Financial Crisis. But "the coronavirus pandemic has accelerated the trend significantly," stated a recent article (Marin, 2021). "Some issues are best handled domestically," the Chatham House submitted, naming the supply-chain issue as the newly manifested Achilles' heel of globalization during the pandemic. "The COVID-19 pandemic illustrates the danger of relying on global supply chains for essential medical supplies." Ironically, what was once celebrated as the epitome of sophisticated globalization now presented itself as an underlying fracture or a disjuncture in the system. Untold riches were accumulated by a few companies strategically located as distributors of "things" in the cross-border value chains. Nevertheless, even those companies are having to recalculate their business models as observers predicted, "using data from the financial crisis, . . . that the COVID-19 shock is likely to lead to a 35% decline in cross-border value chains—the main factor driving globalization over the last three decades" (Marin, 2021). Similarly, other scholars observed:

> The process of international economic integration, a major driver of the globalization process and of economic growth, has been slowing down since the global financial crisis (2008–09). The last decade has witnessed a decline in the growth of international trade in merchandise, a slowdown in the dynamism of global value chains (GVCs) and significant declines in international capital flows. (Akman et al., 2021)

Whether these are lasting trends in the longue durée of capitalism, or manifestations of an ordinary cycle of contraction or course correction in capitalist expansion, is up for discussion. Manfred B. Steger (2020: 129–30) offered three possible scenarios. Although envisioned long before the COVID pandemic hit, the first scenario presciently anticipated the potential for "backlash against globalization with the consequence of increased restrictions to movement and the strengthening of political authoritarianism." An opposite scenario involved "the weakening of nationalist populism and a return to a neoliberal, left-leaning globalization, possibly with a high-tech face." For some, the backlash appears to have the momentum in these days. Others, even those who recognize the power of "deglobalist sentiments," see an inexorable global recovery in the years to come. Benedikter (2022: 8–11) captures the paradoxically interrelational and codependent dynamics of future globalizations, or reglobalization, when he points out that both the progressive idealist and conservative populist trajectories will feed off and animate each other even as they pursue their narrow objectives.

> Since the 2000s, different concepts and practices of globalization have been in part at loggerheads with one another, in part coexisting with hardly any ideological value points of contact, despite close infrastructural, financial, economic or technological interlocking. (Benedikter, 2022: 8)

No matter the envisioned future, the discussions are bound to reveal that globalization is not an accidental value-free development, but a product of the value-laden orchestrations within the capital-driven worldwide system. Contemporary systemic shifts in multiple arenas of life ranging from political, economic, and technological fields all intersect through capitalist relations. Capitalism has functionally integrated all productive activities across the world, orchestrating their value or worth as part of its singular logic and ideology. As Steger put it, it has orchestrated "profound social transformations centered on the market" through "intensification and stretching economic connections across the globe" (2020: 38). Not only is there no outside to capitalism and market any more, as Jacques Derrida (1994) once suggested, but also, there is no uniform inside where differences should ideally melt into a productive cauldron in the service of the capital-driven system. Instead, presently all-encompassing, the system finds itself with deepening hierarches and sharpened internal contradictions and disjunctures. The COVID pandemic lifted the veil off of these systemic rifts. More lives have become economically precarious across the world both in the West and the Rest even as the capitalist economy grows and expands. According to the European Commission,

> income inequality between countries has been decreasing but inequality within countries has been increasing. Seventy percent of the world's population lives in countries where disparities between the wealthiest and poorest have grown over the last 30 years.[1]

While growing inequality does not directly correlate with precarity, it feeds precarity in the absence of policies and actions that would mediate the worst effects of inequality. There appears to be no sustained effort around the world to address dynamics other than rhetorical allusions to development, multilateralism, equity, et cetera. These patterns complicate the arguments that deglobalization is a return to the status quo ante, where the previously privileged West will turn inward, reshoring production in its economic realm once again and offering its citizens the economic privileges they once enjoyed. Given that capital is the driving force of global economy, this does not seem feasible, nor is it in congruence with the nature of capitalism. It's true that it is no longer the case that citizens of the Global West are the uniquely favored beneficiaries of global opportunities or that people of the Rest are condemned to suffer economically and politically. As Slavoj Žižek put it somewhat dramatically but succinctly, increasingly, "ordinary people all around the world are left behind or deserted by God and Country," now having to deal with their economic vulnerabilities on their own (Soguk, 2021). Similarly, more and more ecological and environmental degradation is introduced into the social and economic fabric even as the rhetoric of sustainability and resiliency is normalized and monetized in novel ways. According to the 2021 National Intelligence Council Estimate on Climate Change, global climate change alone will introduce unprecedented tensions and risks into the global geopolitical arena around cross-border issues like "the cost of decarbonization, predatory competition over scarce resources such as minerals, food and water, ungoverned geoengineering, and climate-induced human displacement" (NIC, 2021). Worse, universally, all living things, not least the actual human bodies, are being penetrated by a techno-logic, ever more effective and precise in its science and arguably more sinister and colonizing in its intent and reach. A RAND study on "Rethinking Security" for the Year 2040 lists some potential areas open to such eventualities:

> AI exceeding human capabilities ("The Singularity" or "Super-Intelligence"); machines supplanting humans; and/or humans transferring their brains to computers ("eternalism"); AI rapidly displacing a significant portion of the labor force; genomic editing (CRISPR/Cas-9) becoming widespread; quantum computing [enabling nano technological subjectification of human and nonhuman life forms to intervention and surveillance]; Robotic and cyber warfare eclipsing human participation thus [delinking and distancing humans from destruction of human and nonhuman life forms]. (Hoehn et al., 2018: 8)

New forms of human and nonhuman life enslavement are indeed in the making! In his play *The Life of Timon of Athens*, Shakespeare has the character of Painter respond to the question of "How goes the world?" "It wears sir, as it grows" is the Painter's answer (Act I, Scene 1). The lesson here is relevant to the discussion on globalization at hand within the contemporary capital-driven system. As the world grows, it also wears itself down where the wears become the very price of

the world's capital-driven growth. While this growth characterizes itself as participatory or "democratic" in theory, in praxis, it has proven to be less than liberating, neither equality-envisioned nor equity-driven in intent or results. Wears and tears such as increasing precarity amongst people, mass migrations, ethnic, religious, and racial tensions, and climate change collectively compose a considerable part of the capitalist "inside" or "contents." None of these phenomena are exterior to capitalist "world-making" or "worlding." They are its frictional, if not functional, by-products or consequences in finance, trade, and technology. The COVID pandemic became the viral mirror on which all became visible even if only fleetingly.

GLOBALIZATION REDUX

Planetary shifts bound up with relations and institutions of globalization are recasting the global geopolitics. As the proverbial world grows and tears and wears apart, producing wealth as simultaneously generating insecurities, capital's infrastructural forces as well as symbolic orders of the superstructure adapt and adjust both to secure the system and to suppress the dangers within. Dual demands weigh heavily on these forces and orders.

On the one hand, "globalization is associated with across-the-board liberalization, growing inequality, financial crisis, and a sense of not being able to control one's own economic and social destiny. COVID-19 has in many ways reinforced the belief that the pandemic wouldn't have been as bad if we weren't so open" (Massoud & Lee, 2021). On the other hand, and paradoxically, addressing many of the ill effects or the unexpected consequences of globalization will have to call upon the global relations and institutional mechanisms of coordination that have motored globalization in the first place. The first set of effects might fuel autarchic or even autochthonic tendencies. However, the level of economic integration that has fundamentally altered the world, especially through technology, will likely compel a return to the global framework in ideal and praxis. I see three reasons for such a future.

First, nothing has deeply shifted in the fundamental structure of the world economy. Comparative advantages, shifting as they are, still link the world's resources at once horizontally and hierarchically. Horizontal integration (linking) of peoples, places, and industries by their differentiation (hierarchizing) within the value exchange system will continue to spur globalization in light of the new global landscape. With new technologies enabling a global knowledge market, the drive for comparative advantage remains at the heart of the capital-dominated economies for which the entire world is a domain of activity. "Capitalism is rapacious, due to its quest for endless accumulation," wrote Charles C. Lemert. "But its obsession with change also makes it capacious, expanding and altering global capacity for new technologies, new relations, and speed . . . to overcome the conflicts arising" (Lemert, 2015: 166). Now more than likely, prolific discourse

on deglobalization being a possibility will "induce a significant qualitative shift in strategies, structures, and behaviors observable in international business (IB) . . . to develop a much deeper integration of politics" against antiglobalizing tendencies (Witt, 2019: 1053–58). Not only is there no fundamental evidence to the contrary along the lines deglobalization advocates suggest, but also the evidence shows that even the disjunctures and fractures, as exposed by the COVID-19 pandemic, ultimately show that autarchy and autochthony are (a) not possible and (b) neither desirable (c) nor ultimately economically sustainable.

The case of vaccine manufacturing captures the dynamics of complex interdependence that cannot be undone without major ramifications. During the pandemic, India's Serum Institute was named time and again as the largest vaccine producer in the world. The company is indeed a mega company that supplies India and the world with a plethora of vaccines. In 2020, the Serum Institute entered into an agreement with Oxford-Astra Zeneca to manufacture an affordable COVID vaccine, promising to reach a capacity of one hundred million COVID vaccines per month by April 2021 (Freyer, 2021). The company proved its worth during the Delta variant crisis by supplying Indian needs for vaccination. But its success in India came at the expense of the company's promises to supply other countries. The primary reason for falling short turned out to be the company's dependence for vaccine raw materials and equipment on its worldwide partners, especially in the United States. Among the capital equipment required for turning the drug substance into a vial are "bioreactors and filtration pumps . . . continuous supply of single use (disposable) materials such as bioreactor bags, filters, and tubing, as well as chemicals and cellular and other raw materials known as consumables . . . [finally] assembly lines to squirt liquid vaccine into millions of tiny vials, adding caps and labels, and then packaging them up for distribution" (Bown & Rogers, 2021). When a shortage materialized in this market, the Serum Institute's capacity was hit hard, in effect, highlighting the complex interdependence at work in multiple directions. Interestingly, the United States experienced intensive care unit shortages for similar reasons in the supply chain providing parts for the devices. "Manufacturers of medical devices do not make every item that goes into their products by starting from raw materials . . . . They [buy] machined *[sic]* parts, electronic components, chemicals, and materials from suppliers around the world. Those suppliers, in turn, buy supplies from other suppliers, and so on" (Chen et al., 2021: 6). Examples along these lines abound, to show that despite disruptions, these global connections still afford comparative advantages and value, even as they sustain various economic hierarchies and unequal relations across the globe. So long as comparative advantages retain their value and efficiency, they are likely to fuel globality through both scalable and nonscalable processes.

Second, the COVID pandemic proved revelatory of what may have gone wrong with globalization but also showed that a meaningful course correction will have to rely on the extant mechanisms and institutions of globalization. The well-heeled networks of trade, finance, capital, information, and people that regulate global

flows may be tinkered with in light of the discontents, but it would be unreasonable to expect substantive changes in their structures and objectives. Already, drivers of such networks, from major banks to transportation giants, are working to preempt the nature of the discussion about the discontents/disjunctures revealed by the COVID-19 crisis. The common message appears to be that the woes of globalization brought about by the pandemic are mostly over, as seen in the nearly full restoration of prepandemic global flows in four essential areas: trade, capital, information, and people.

> COVID-19 has not caused globalization to collapse . . . . Trade in goods has surged to well above pre-pandemic levels, powerfully supporting the global recovery even as capacity challenges and trade tensions persist. The pandemic dealt a major blow to international capital flows, but portfolio equity flows stabilized in mid-2020 and foreign direct investment (FDI) rebounded sharply in 2021 . . . . The pandemic hit international people flows the hardest, and they are on track to recover the slowest . . . . Global flow patterns show no evidence of a major shift toward regionalization. Long-distance trade has grown faster than short-distance trade during the pandemic . . . . The world's poorest countries are falling behind in the globalization recovery. Stronger global connectedness could accelerate the world's recovery from COVID-19. Vulnerabilities highlighted by the pandemics should be addressed for a more prosperous and resilient future. (Altman & Bastian, 2021)

This DHL report was effusively received as great news. The World Economic Forum trumpeted it by declaring: "Globalization and world trade bounce back from the impact of COVID-19: report" (Broom, 2021). Linking the article to a piece on the "Global Alliance for Trade Facilitation,"[2] a private-public partnership initiative of "Platform for Shaping the Future of Trade and Investment,"[3] the World Economic Forum asked, "Have you read? Why the world needs better—not less globalization" (Broom, 2021).

Tellingly, in all these conversations, there is only a whisper of an acknowledgment that return to "normal" demands attention to some issues. For example, the DHL report's takeaways speak of the "world's poorest countries . . . falling behind in the globalization recovery." "Vulnerabilities highlighted by the pandemics should be addressed for a more prosperous and resilient future," it insists (Altman & Bastian, 2021). Four areas are named as deserving immediate attention and coordination for a more prosperous future ahead: "Fortify global and regional supply chains; Bolster trade agreements and international institutions; Prevent the world's poorest countries from falling further behind; [and] Secure the future of digital globalization" (Altman & Bastian, 2021). Ian Goldin and Robert Muggah similarly argue that "the pandemic offers a once-in-a-lifetime opportunity to reset globalization to ensure that the benefits are more widely shared and the threats it compounds—pandemics, climate change, inequality and so on—are greatly reduced" (Goldin & Muggah, 2020).

Conceivably, each of these areas can potentially fuel both competitive and cooperative orientations and capacities, especially given the intersectionality of

technology with global economic functions. However, as noted before, the transversal nature of the challenges to global capitalism's infrastructural and superstructural (symbolic) edifices, from global health crises and climate change to mass migration, are likely to induce substantial collective problem-solving capabilities beyond comparative competitiveness. For example, every predicted natural effect of climate change, ranging from extreme temperature variations, droughts, and heavy precipitation to sea level rise, is predicted to necessitate transborder collaboration and coordination. The imperative for cooperation is rooted in the objective to avoid exacerbating conflicts over natural and manufactured resources. "Epistemic communities of problem-solving" will likely emerge as reasoned responses. The drive to retain and enhance some national capacities may remain in the face of popular agitation in more advanced economies but will have to intersect with global risk management efforts that are needed for capital's mobility and access to resources around the world. Out of sheer necessity, the future is likely to be shaped in equal measure by pragmatic cooperation and reflexive competition.

There is now more noise about supporting multilateralism and international policy organizations and careful regulation to foster such a future. "The coronavirus pandemic has . . . demonstrated that unregulated globalization can be dangerous" (Farrell & Newman, 2020). "Building multilaterally with mega-regional bricks" is one idea in an effort to build consensus on world economy from the regional to the global level, as opposed to orchestrating consensus globally from the top down. The proliferation of voices on the whole is in favor of more globalization, not less, with some talking about reforming globalization by tweaking its functional cogs and others calling for more drastic shifts in its mechanical operations towards what they call "democratic globalization." Yet others assess an interconnected understanding involving "*refining, reframing, reforming, redefining* and/or *revisioning* [globalization's] current status and mechanisms, as well as its concepts and methodologies" (Benedikter & Kofler, 2019). With the latter, the hope is to envision concepts and practices that mediate a more inclusive and resilient globalization at all levels.

Third, at the outset of the chapter I argued that the COVID pandemic has already fueled centrifugal nationalist or neopopulist sentiments around the world, especially within the proverbial Western world and less vociferously in the Global South. Calls abound for "returning" to self-sufficiency on account of the "negative externalities" of global flows on national milieus. One group of observers contented that "externally networked structures at the global scale" not only fuel anxieties derived from immigration and "elevate risk of contagion in financial downturns," but also "increase inequality and social polarization" (Balsa-Barreiro et al., 2020). President Emmanuel Macron of France echoed the sentiment, stating that the COVID pandemic "will change the nature of globalization, with which we have lived for the past 40 years," adding that it was "clear that this kind of globalization was reaching the end of its cycle" (Irwin, 2020).

Accompanying these sentiments are messages from the "Global Rest" that a retreat from globalization, if feasible at all, will not deliver relief from what Edouard Glissant called the *chaos monde* (the world that contains immensely plural experiences resistant to control) that is nevertheless organized and choreographed into the global whole, the entire world in relations—*tout-monde* (1997: 94). The "echoes" of the world are already inextricably within the orchestrated "chaos" of global capitalism. Capitalism works to extract economic cohesion out of the world's chaos. A neopopulist retreat without structural changes to the prevailing relations of unequal exchange will further exacerbate structural inequalities and exhilarate global migration. Ignoring transversally or transnationally generated precarities or vulnerabilities of the people in the margins is, as mentioned, sure to feed centripetal migrations (from the Global South). In the end, however, both dynamics, like the paradoxical dynamics I alluded to at the outset, will likely further globalization, for both are a priori bound up with (and within) the already globalized productive infrastructure, whether digital and knowledge industries or mining or manufacturing or transportation sectors.

For example, calls for a retreat from global integration in the West assume a return of the strong national state as an arbiter. Some countries such as Russia, Hungary, and Poland already bill themselves as exemplars in this regard. However, there are also calls for which "the retreat" means altogether something else in the Global South. Walden Bello expressed their underlying meaning as early as in 2002:

> Deglobalization is not a synonym for withdrawing from the world economy. It means a process of restructuring the world economic and political system so that the latter builds the capacity of local and national economies instead of degrading it. Deglobalization means the transformation of a global economy from one integrated around the needs of transnational corporations to one integrated around the needs of peoples, nations, and communities. (Bello, 2002: 108)

We know that Bello's vision has not materialized in any real measure. In some measure, Bello's words still resonate when he argues that "the defining logics of contemporary capitalism—from the pervasiveness of debt to financialization, from the precarization of work to the penetration of entrepreneurial rationality into the institutional management of welfare and migration—are far from being challenged." At the same time, neo-authoritarianist visions in places like Russia, Hungary, and China, always in need of continuing legitimacy, appear to call into question some of the mechanisms of capitalist logic—though not for the purposes of altering the fundamentals of capitalism but for making them serve their increasingly oligarchical interests. Ironically, challenges from the Left remain anemic against the background of Left politics that has largely jettisoned "class" as an organizing or ordering factor. Given these realities, overall, the conversations on the post-COVID world are already about affirmation of the fundamentals of the

capitalist logic, and nation-states' role within, not challenging these fundamentals. The UNCTAD declared that much under the "prosperity for all" slogan: "UNCTAD's Handbook of Statistics for 2021 published on 9 December nowcasts a strong increase of 22.4% in the value of global merchandise trade this year compared with 2020. The strong growth will push the value of world trade in goods about 15% higher than before the COVID-19 pandemic hit."[4] In its report "The Future of Globalization," Wells Fargo was similarly optimistic in its fidelity to capital-driven globalization. The report starts with an abiding confidence in globalization where national institutions simply serve as conveyer belts for global recovery: "We believe that crosscurrents in technological, economic, and political forces likely will change the contours of globalization but not end it . . . The familiar pattern of extended supply chains fragmented across multiple low-wage production centers appears to be evolving toward more concentrated, high-tech, and regional trade. We believe that globalization is evolving toward much broader and persistent opportunities in traded services and cutting-edge technologies."[5]

The role ascribed to the national states in his vision anticipates no change in position but in their proximity with levers of economic orchestration. The return of states does not demand distancing from the capitalist externalities beyond a nation's borders. Rather, it installs states as "regulators . . . in tight association with multinational private capitals, whose weight in national economies is growing more and more" (Mezzedra & Neilson, 2013: 178). The Atlantic Council prescribes the role for the United States starkly: "Seize the historic moment to lead" (Cimmino et al., 2020: 2). "With cooperation, determination, and resolve, the United States and its allies can recover from the crisis and revitalize an adapted rules-based system to bring about decades of future freedom, peace, and prosperity" (Cimmino et al., 2020: 2).

CONCLUSION

Sandro Mezzedra and Brett Neilsen argue that "borders remain central to the heterogeneous organization of space and time under global capital." But, by borders, they refer not simply to state borders but to the boundaries constructed discursively. "Understanding the border in a wide sense," they argue, "is by no means limited to the conventional geopolitical line." It may mean, for instance, "urban divides within cities." It may mean "limits surrounding 'special economic zones.'" It may refer to the "shattering of old spatial hierarchies, the reshuffling of geographies of development, and the emergence of new regionalisms and patterns of multilateralism." It may also invoke the "resistance of the poor against the economies of urban extraction surrounding slums and the many struggles, which have sprung up in the world's factories and sweatshops" (Mezzedra & Neilsen, 2013). Capital organizes the world through these proliferating borders.

Thus, the discussion about globalization need not be, nor can it be, reduced to a certain territorial retreat from the world into nations' boundaries. The tendency to cast the discontents about globalization in such territorial terms also delimits the critical, even emancipatory, responses that can be imagined and activated. As much as territories are associated with sovereign statehood, peoplehood, and citizenship, they also have already been penetrated by global capitalism as "a political technology for organizing social and economic relations" (Mezzedra & Neilsen, 2013). While these relations have sovereign spatial dimensions in terms of a right of the state to regulate, they are also inflected by or incorporated into extrasovereign transversal interests that are not easily amenable to sovereignty claims and demands.

Ultimately, for all the noise around deglobalization, antiglobalization, or retreat from globalization, not to mention "slowbalization," globalization as a process appears to be here to stay for the foreseeable future (Feffer, 2019). The fractures and disjunctures exposed by the COVID pandemic may unleash both centripetal and centrifugal forces, but will do so into the already hyperconnected world. Paradoxically, what may simultaneously empower these seemingly contradictory forces and dynamics is the very infrastructure of capital-driven globalization, along with the "symbolic order" or the superstructure, as Pierre Bourdieu (1998: 82) called it, that discursively supports and legitimizes the capitalist worldmaking. Ironically, then, both the infrastructural and the symbolic networks that regulate capital's messages inevitably also host the global solidarities in resistance to capitalist projects and programs. Of course, the resilience of globalizing forces does not mean the "end of history" with globalization triumphing permanently, as there is no inexorability into the immediate future and beyond. The discursive formation of the constitutive elements undergirding globalization is always subject to historical shifts, now favoring capital but later, perhaps, favoring human (and nonhuman) solidarities defined beyond capital-driven "accumulation, dispossession, and exploitation." In a historical twist, an infinitesimally small virus revealed that change is always in the offing in all that may appear solid.

NOTES

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The Future of Global Capitalism

Crisis, Financialization, and Digitalization

William I. Robinson

ABSTRACT

The current moment in world capitalism is defined by three key developments. First, the system has become universal through globalization processes that date to the late twentieth century. Second, the system is undergoing a new round of restructuring and transformation based on a much more advanced digitalization and financialization of the entire global economy and society. Third, the system faces an unprecedented capitalist crisis that is as much economic, or structural, one of overaccumulation, as it is political, one of state legitimacy and capitalist hegemony. This crisis is also existential because of the threat of ecological collapse as well as the renewed threat of nuclear war and the danger of future pandemics that may involve much deadlier microbes than coronaviruses. Despite much talk of "deglobalization" and the breakdown of global supply chains in the wake of the coronavirus economic meltdown, world trade reached a record high in 2021. Transnational elites are pinning their hopes on a new wave of capitalist expansion and prosperity through digitally driven restructuring. Even if a new period of digitally driven expansion displaces the structural crisis temporally into the future, global capitalism will continue to generate social crises of survival and well-being for billions of people.

KEYWORDS

capitalist crisis, digitalization, global capitalism, globalization

As any dialectician would tell us, the only thing permanent in the universe is change itself. Everything is in a process of emergence, development, transformation, and ultimately transcendence into something qualitatively new. Capitalism as a social system is no exception. The current moment in world capitalism is defined

by three key developments. First, the system has become universal through globalization processes that date to the late twentieth century. Second, the system is undergoing a new round of restructuring and transformation based on a much more advanced digitalization and financialization of the entire global economy and society. And third, the system faces an unprecedented crisis that is as much economic, or structural, as it is political, one of state legitimacy and capitalist hegemony. This crisis is also existential because of the threat of ecological collapse as well as the renewed threat of nuclear war, to which we must add the danger of future pandemics that may involve much deadlier microbes than coronaviruses.

Scholars have never arrived at anything close to a consensus on how to define globalization, or indeed, if it is even a useful concept. In my conception, globalization constitutes a qualitatively new epoch in the ongoing and open-ended evolution of world capitalism, characterized above all by the rise of truly transnational capital and the integration of every country into a new globalized system of production, finance, and services. Globalization proceeds from three earlier epochs in the history of world capitalism—mercantilism, competitive or classical industrial capitalism, and national corporate or "monopoly" capitalism (Robinson, 2004, 2014). Each of these long waves in the system's development involved a series of minor crises that eventually culminated in major system-wide structural crises that were resolved through worldwide restructuring as new class relations, institutions, technologies, and patterns of capital accumulation came into being.

The world capitalist crisis that began in the 1970s is generally identified as the turning point for globalization as capitalists searched out new modes of accumulation and ruling elites set out to restore capitalist hegemony. Capitalism was able to transcend the 1970s crisis by "going global," leveraging globalization processes into a vast restructuring and integration of the world economy. As the global economy emerged, production was the first to transnationalize, starting in the late 1970s, epitomized by the rise of the global assembly line and the spread of modern-day sweatshops in free-trade zones around the world. Next, following a wave of financial deregulation in most countries around the world, national banking and financial systems transnationalized in the 1990s and 2000s. The transnationalization of services has since followed through a new wave of international trade-in-service and other agreements that have expedited the decentralized provision across borders of services as well as the privatization of health care, telecommunications, and other industries.

Now, however, the debate on globalization has taken a new turn in light of a new system-wide crisis that began with the 2008 global financial collapse. World trade contracted for the first time in several decades in the wake of the 2008 global financial collapse, while populists and political demagogues, mostly from the Far Right, put forth a protectionist and antiglobalization discourse as they stoked the fans of xenophobia and nationalism. Then the coronavirus pandemic triggered an

economic meltdown in 2020 unmatched since the Great Depression of the 1930s, rupturing global trade and supply networks. The breakdown during the height of the pandemic of these networks, so emblematic of globalization, led many to predict a wave of diversification in supply chains, "de-globalization," and the near-shoring or reshoring of production and supply chains that had previously been offshored. Academics and pundits declared that the world was moving into a period of "deglobalization."

In fact, however, an analysis of the data and of the underlying structural transformations underway suggests quite the opposite—that we are approaching a new round of globalization based on a much more organic integration of economy and society around the globe. Globalization scholars Manfred B. Steger and Paul James (2020) show how the leveling-off of cross-border trade in goods and a dip in cross-border financial flows after the 2008 crisis was more than compensated for by a massive increase in global digital connection, so that instead of deglobalization there is a shift from "embodied globalization," by which they mean the physical mobility of human beings, and "object-related globalization," which refers to the mobility of physical objects, to what they term "disembodied globalization," which pertains to intangible global transactions such as those I will discuss below. Even at that, however, trade in goods in fact rebounded from the 2008 collapse, the 2015 recession, and from the 2020 pandemic meltdown (UNCTAD, 2021). But as we will see, this new wave of digitally driven globalization that is upon us is unlikely to resolve the crisis of global capitalism. To the contrary, it is largely *driven by the crisis*.

GLOBAL CAPITALIST CRISIS

Despite claims to the contrary by neoclassical economists, crisis is endemic to capitalism, and instability rather than equilibrium is the natural state of the system. The history of capitalism is one of periodic crises of two types. One is cyclical, sometimes called the business cycle, and shows up as recessions. They typically occur about every ten years. There were recessions in the early 1980s, the early 1990s, and the early 2000s. The other is more serious, a structural crisis, or what I call a restructuring crisis because its resolution requires a major restructuring of the system. Cyclical crises may affect only certain countries or regions, whereas structural crises generally affect the entire world economy. In the course of the twentieth century the system experienced two restructuring crises, the Great Depression of the 1930s and the crisis of stagnation and inflation (known as "stagflation") of the 1970s. Both these crises had their origin in what political economists call overaccumulation. In simplified terms, this refers to a situation in which enormous amounts of capital (profits) are built up but this capital cannot find productive outlets for reinvestment. This capital then becomes stagnant,

as capitalists hold on to their accumulated profits rather than reinvesting them, throwing the system into crisis.

The structural crisis of the 1930s was overcome through a Keynesian emphasis on state intervention to regulate the market and bring about redistribution; that of the 1970s was overcome through globalization. The financial collapse of 2008 marked the start of a new structural crisis that now threatens to become *systemic* as we approach devastating climate disruption and the ecological limits to capitalism's reproduction. In response to the crisis, the system has been undergoing a new round of restructuring and transformation based on a much more advanced digitalization of the entire global economy and society. The coronavirus contagion has turbo-charged these transformations. The agents of global capitalism are attempting to purchase for the system a new lease on life through this digital restructuring and through reform that some among the global elite are advocating in the face of mass pressures from below. If some regulatory or redistributive reform actually comes to pass, this restructuring *may*—depending on the play of social and class forces—unleash a new round of productive expansion that attenuates the crisis. In the long run, however, it is difficult to see how global capitalism can continue to reproduce itself without a much more profound overhaul than is currently on the horizon, if not the outright overthrow of the system.

The transnational capitalist class (TCC) had attempted to resolve the crisis of the 1970s by going global, as we have seen. Capitalist globalization and neoliberal austerity did lead to a new economic boom in the late twentieth and early twenty-first centuries. This process pushed the global working and popular classes onto the defensive and shifted the global balance of class forces in favor of transnational capital following the period of mass struggles in the 1960s and 1970s. But by liberating emergent transnational capital from national constraints, globalization undermined the redistributive programs that had attenuated capitalism's inherent tendency towards social polarization and had helped ensure the system's survival, at least for a while. The result has been an unprecedented sharpening of inequality that has fueled overaccumulation. Indeed, the level of global social polarization and inequality now experienced is without precedent. In 2020, the richest 1 percent of humanity had come to control more than half of the world's wealth while the bottom 80 percent had to make do with just 5 percent.[1] If left unchecked, expanding social polarization results in crisis—in stagnation, recessions, depressions, social upheavals, and war—just what we are experiencing at this time.

Although overaccumulation originates in the sphere of production, it becomes manifest in the sphere of circulation, that is, it shows up in the market as a crisis of overproduction or underconsumption. This refers to a situation in which the economy has produced—or has the capacity to produce—great quantities of wealth but the market cannot absorb this wealth. Overaccumulation appears first as a glut in the market and then as stagnation. In fact, in the years leading up to

the pandemic there was a steady rise in underutilized capacity and a slowdown in industrial production around the world (see, inter alia: Cox, 2019; Toussaint, 2020). The surplus of accumulated capital with nowhere to go expanded rapidly. Transnational corporations recorded record profits during the 2010s at the same time that corporate investment declined (*The Economist*, 2016). The total cash held in reserves of the world's two thousand biggest nonfinancial corporations increased from $6.6 trillion in 2010 to $14.2 trillion in 2020—considerably more than the foreign exchange reserves of the world's central governments—as the global economy stagnated (*The Economist*, 2020: 60). The extreme concentration of the planet's wealth in the hands of the few and the accelerated impoverishment and dispossession of the majority meant that transnational capital had increasing difficulty in finding productive outlets to unload the enormous amounts of surplus it accumulated. The more global inequalities expand, the more constricted the world market becomes and the more the system faces a structural crisis of overaccumulation.

The tendency for capital to overaccumulate is just that—a tendency that can be offset, temporarily at least, by what are called countervailing tendencies and by mechanisms that may counteract the tendency. Frenzied financial speculation, unsustainable debt, the plunder of public finance, and state-organized militarized accumulation are just some of the mechanisms that the TCC and capitalist states turned to in the years leading up to the pandemic to keep the global economy sputtering along in the face of chronic stagnation (Robinson, 2020). As the productive economy has stagnated, capitalists have turned above all to financial speculation. The global economy has become a giant casino for transnational investors. In the wake of the Great Recession of 2008 the U.S. Federal Reserve undertook a whopping $16 trillion in secret bailouts to banks and corporations from around the world (GAO, 2011). But then the banks and institutional investors simply recycled the trillions of dollars they received into new speculative activities in global commodities markets, in cryptocurrencies, and in land around the world, fueling a new global "land grab." As opportunities have dried up for speculative investment in one sector, the TCC simply turns to another sector to unload its surplus.

As a result, the gap between the productive economy and fictitious capital has grown into an enormous chasm. Fictitious capital refers to money thrown into circulation without any base in commodities or in production (see, inter alia, Durand, 2017). A major portion of the income generated by financial speculation is fictitious, meaning (here in simplified form) that it exists on paper but does not correspond to real wealth in the world, that is, goods and services that people need and want, such as food, clothing, houses, and so on. The trade in this fictitious capital represents less the creation of new value or expanded production than the mirage of a bustling economy, as stock markets surge, asset values inflate, and credit expands. The accumulation of fictitious capital through speculation may offset the crisis temporally into the future or spatially to new digital geographies

and new population groups but in the long run only exacerbates the underlying problem of overaccumulation. In 2018, for example, the gross world product or the total value of goods and services stood at some $75 trillion, whereas the global derivatives market—a marker of speculative activity—was estimated at a mind-boggling $1.2 quadrillion (Maverick, 2020). This accumulation of fictitious capital gave the appearance of recovery in the years following the Great Recession of 2008. But it only offset the crisis temporally into the future while in the long run exacerbating the underlying problem.

THE SECOND DIGITAL AGE

Structural crises such as those of the 1930s and the 1970s typically involve the transformation of patterns of capital accumulation and new rounds of expansion, often incorporating new cutting-edge technologies, such as synthetic materials, consumer durables, automotive and petrochemicals, and military-industrial technologies that drove the post–World War II boom. Early in the twentieth century, the Soviet economist Nikolai Kondratieff noted how the world economy, driven by new cutting-edge technologies, experiences cycles of some forty to fifty years (called Kondratieff waves). In these cycles, rounds of expansion eventually become exhausted and are followed by downturns and crises, resulting in a reorganization of the system and new technologies that help launch a new cycle. However, the underlying causal dynamic that drives these cycles forward is the struggle among contending social and class forces. New Deal and social democratic arrangements together with world war and postwar expansion "resolved" the structural crisis of the 1930s. But the contradictions internal to the model of redistributive nation-state capitalism led to a new structural crisis in the 1970s. As noted above, the emerging TCC "resolved" this crisis through sweeping worldwide economic restructuring.

Global capitalism appears now on the brink of another wave of restructuring and transformation based on a much deeper digitalization of the entire global economy and society. At the core of this new wave of technological development is more advanced information technology or so-called fourth industrial revolution technologies (see, inter alia, Brynjolfsson et al., 2014; Ford, 2015; Schwab, 2016; Srnicek, 2016; Robinson, 2022b). Led by Artificial Intelligence (AI) and the collection, processing, and analysis of immense amounts of data ("big data"), the emerging technologies include machine learning, automation and robotics, nano- and biotechnology, the Internet of Things (IoT), quantum and cloud computing, 3D printing, virtual reality, new forms of energy storage, and autonomous land, air, and sea vehicles, among others. Computer and information technology (CIT), first introduced in the 1980s, provided the original basis for globalization. It allowed the TCC to coordinate and synchronize global production sequences and therefore to put into place a globally integrated production and financial system into which every country has become incorporated. It also made possible the

global integration of national financial systems and new forms of money, such as hedge funds or secondary derivative markets. It enabled the frictionless and instantaneous movement of money (value) in its diverse forms around the world, bringing about the financialization of the global economy discussed above. Just as the original introduction of CIT and the Internet in the late twentieth century profoundly transformed world capitalism, this second generation of digital-based technologies is leading to a new round of worldwide restructuring that promises to have another transformative impact on the structures of the global economy, society, and polity.

It is hard to underestimate just how rapid and extensive is the current digital restructuring. According to UNCTAD data (UNCTAD, 2019: multiple pages and tables), the "sharing economy" will surge from $14 billion in 2014 to $335 billion by 2025. Worldwide shipments of 3D printers more than doubled in 2016, to over 450,000, and were expected to reach 6.7 million by the end of 2020. The global value of e-commerce is estimated to have reached $29 trillion in 2017, which is equivalent to 36 per cent of global GDP. In that year, 277 million people made cross-border purchases through e-commerce. Digitally deliverable service exports amounted in 2019 to $2.9 trillion, or 50 percent of global services exports. By 2019 global Internet traffic was 66 times the volume of the entire global Internet traffic in 2005, whereas Global Internet Protocol (IP) traffic, a proxy for data flows, grew from about 100 gigabytes (GB) *per day* in 1992 to more than 45,000 GB *per second* in 2017. And yet the world is only in the early days of the data-driven economy; by 2022 global IP traffic was projected to reach 150,700 GB per second, fueled by more and more people coming online for the first time and by the expansion of the IoT. We are approaching a situation, or may well have arrived at it, in which every person on the planet is connected—for the most part directly although everyone indirectly—through a single common digital network. Already by 2015 more than 30 percent of the global population was using social media platforms. By 2019 there were 5.2 billion smartphones in operation worldwide and more than half the planet was online (Schwab & Malleret, 2020: 27, 165).

If the first generation of capitalist globalization from the 1980s on involved the creation of a globally integrated production and financial system, the new wave of digitalization and the rise of platforms have facilitated since 2008 a very rapid transnationalization of digital-based services. By 2017 services accounted for some 70 percent of the total gross world product (Marois, 2017) and included communications, informatics, digital and platform technology, e-commerce, financial services, professional and technical work, and a host of other nontangible products such as film and music. This shift worldwide to a service-based economy based on the widespread introduction of fourth industrial revolution technologies brings about a sea change in the structure of capitalist production towards the centrality of knowledge to the production of goods and services. This has involved the increasing dominance of intangible capital (literally, capital that is not physical

in nature), what has alternatively been called "intellectual capital," "intellectual property," and "immaterial production," along with the associated concept of immaterial labor, cognitive labor, and knowledge workers, in reference to workers involved in immaterial production. To use Steger and James's (2020) term, there is a vast expansion of "disembodied globalization."

The COVID-19 pandemic boosted the efforts of the giant tech companies and their political agents to convert more and more areas of the economy into these new digital realms (Robinson, 2022b). At the center of global restructuring are the giant tech companies, among them Microsoft, Apple, Amazon, Tencent, Alibaba, and Facebook. These companies experienced astonishing growth in the 2010s. Added now to the earlier tech behemoths are Zoom, Netflix, and other companies boosted by the pandemic as well as tech firms such as Taiwan Semiconductor Manufacturing (TSM), whose expansion and market capitalization was ballooning even before the contagion. Zoom daily users jumped by 3,000 percent in the first four months of the pandemic. Moreover, there are now hundreds of up-and-coming tech firms from around the world that prospered during the pandemic and can be expected to expand rapidly as restructuring proceeds. Apple and Microsoft registered an astounding market capitalization of $2.08 trillion and $1.63 trillion, respectively, at the end of 2020. Amazon's capitalization stood at $1.04 trillion going into the pandemic and had climbed to $1.58 trillion by the end of 2020. Alphabet (Google's parent company) registered a $1.2 trillion capitalization, Samsung $983 billion, Facebook $779 trillion, and Alibaba and Tencent some $700 billion each. Meanwhile, in just two years, from 2015 to 2017, the combined value of the platform companies with a market capitalization of more than $100 million jumped by 67 percent, to more than $7 trillion (for the data in this paragraph, see Robinson, 2022b: multiple pages).

A handful of the largest tech firms have absorbed enormous amounts of cash from TCC investors from around the world who, desperate for new investment opportunities, have poured billions of dollars into the tech and platform giants as an outlet for their surplus accumulated capital in search of profits. Annual investment in CIT jumped from $17 billion in 1970, to $65 billion in 1980, then to $175 billion in 1990, $496 billion in 2000, and $654 billion in 2016, and then topped $800 billion in 2019 (Federal Reserve Bank of St. Louis, n.d.). As capitalists invest these billions, the global banking and investment houses become interwoven with tech capital, as do businesses across the globe that are moving to cloud computing and Artificial Intelligence. It is clear that the astronomical amounts involved in the market capitalization of the tech firms were largely a result of stock speculation. There appears to be an enormous gap, difficult if not impossible to measure, between the value of these companies' material assets and their market capitalization, reflecting the same chasm between the real economy and fictitious capital discussed above. This is to say that the relationship between finance and production in the tech sector is the same as it is in the global economy at large.

But could this be a temporary relationship as investment in tech generates a productive reactivation and expansion? Productive recovery would require, under the logic of capitalism, that the rate of profit rises. This would come about, ceteris paribus, from a rise in productivity through digitalization without a corresponding rise in the overall wage rate, or at least that profits rise more quickly than wages. Data shows that from the 1980s on, those corporations that transitioned to CIT were dramatically more productive than their competitors, managing to resolve the so-called "productivity paradox" (Brynjolfsson & McAfee, 2014: 100–101), whereby the growth in productivity notably slowed starting in 1973, the date of the onset of a structural crisis and subsequent globalization.[2] One McKinsey report estimated in 2016 that global growth rates for the next fifty years would slow to almost half of the rate it enjoyed in the previous fifty years, from 3.8 to 2.1 percent. The report pinned hopes on digital technologies as the major source of future growth (Kauffman et. al., 2016).

The breakdown of global supply chains during the pandemic led to much discussion of nearshoring and reshoring, and indeed, some of this was already taking place by late 2021 (Anzolin & Aloisi, 2021). However, it is highly doubtful that reshoring will somehow bring back to rich countries stable, high-skilled, and high-paying industrial and postindustrial jobs, given that the relocation back to the core centers of the global economy will involve high levels of automation (Robinson, 2022b). (As a side note, reshoring or "deglobalization" does not mean that capital ceases to be transnational [see Robinson, 2018, 2022a]. It is *transnational capital* that relocates from one place to another as the geography of global capitalism is continuously reconfigured.) The flip side of reshoring to rich counties is the automation of plants that were offshored. Sweatshops that employ largely young women in cheap labor zones around the world, perhaps the archetypical image of the global economy, may become rarer as the low-skilled and repetitive labor that these sweatshops employ are exactly the type of tasks that are easily automated. As early as 2012, Foxcomm, the Taiwanese-based conglomerate that assembles iPads and other electronic devices, announced following a wave of strikes that year by its workers in China that it would replace one million workers with robots. In fact, official Chinese statistics report a decline of thirty million manufacturing jobs from 1996 to 2014, or 25 percent of the total, even as manufacturing output increased by over 70 percent (Brynjolfsson & McAfee, 2014: 98).

On the other hand, digitalization drives the expansion of cross-border services, as electronic offshoring, unlike the overseas relocation of production facilities, is virtually frictionless and does not add transportation and other ancillary costs such as customs charges. By 2016 the production of CIT goods and services represented 6.5 percent of global GDP, and one hundred million people were employed in the CIT service sector (UNCTAD, 2017: 17). When work is carried out remotely it does not matter where it is performed. The surge in investment in remote working during the pandemic opened the door to increased trade in digital services.

Yet even for services, new digital technologies such as interactive voice response systems are reducing the requirement for direct person-to-person communication and may lead to the automation of call centers around the world. We may see in the coming years a mix of nearshoring and reshoring to rich countries and increased automation in areas that became labor-intensive industrial processing zones and service centers, such as China's Guangdong Province. In the long run, it may be that offshoring is a historical way station on the road to automation. Meanwhile, all signs point to continued crisis, including the prospect of a return to stagflation, despite the recovery of growth rates in 2021 as the world emerged from the worst of the pandemic.

CONCLUSIONS: PROLONGED CRISIS AND THE BATTLE FOR THE FUTURE

Crises provide the TCC with the opportunity to restore profit levels by forcing greater productivity out of fewer workers. This process is driven forward by the new wave of digitalization discussed above, accelerated now in hot-house fashion by the economic and social conditions thrown up by the pandemic. Since the 1980s almost all employment lost in the United States in routine occupations due to automation, for instance, occurred during recessions (for discussion, see Robinson, 2020). The first wave of CIT in the latter decades of the twentieth century triggered explosive growth in productivity and productive capacities, while the new digital technologies promise to multiply such capacities many times over. Specifically, digitalization vastly increases the organic composition of capital, meaning that the portion of fixed capital in the form of machinery and technology tends to increase relative to variable capital in the form of labor. In laymen's terms, digitalization greatly accelerates the process whereby machinery and technology replace human labor, thus expanding the ranks of those who are made surplus and marginalized.

It is true that the first wave of digitalization in the late twentieth century resulted in a bifurcation of work, generating high-paid, high-skilled jobs on one side of the pole, giving rise to new armies of tech and finance workers, engineers, software programmers, and so on. On the other side of the pole, digitalization produced a much more numerous mass of deskilled, low-wage workers and an expansion of the ranks of surplus labor (Robinson, 2020). But the new wave of digitalization threatens now to make redundant much so-called "knowledge work" and to deskill and downgrade a significant portion of those knowledge-based jobs that remain. As "big data" captures data on knowledge-based occupations at the workplace and in the market and then converts it into algorithms, this labor itself is threatened with replacement by Artificial Intelligence, autonomous vehicles, and the other fourth industrial revolution technologies. Indeed, even before the pandemic hit, automation was spreading from industry and finance to all branches of services, even to fast food and agriculture. It is expected to eventually replace much professional

work such as that of lawyers, financial analysts, doctors, journalists, accountants, insurance underwriters, and librarians (Robinson, 2020, 2022b).

It is certainly possible that digitally driven restructuring will unleash a new wave of expansion. But any such expansion will run up against the problems that an increase in the organic composition of capital presents for the system, namely the tendency for the rate of profit to fall, a contraction of aggregate demand, and the amassing of profits that cannot be profitably reinvested. In the larger picture, the heightened structural power achieved by the TCC through globalization and financialization has enabled it to undermine redistributive policies and to impose a new labor regime on the global working class based on flexibilization and precariatization, or proletarianization under conditions of permanent insecurity and precariousness. The International Labour Organization reported in 2019 that a majority of the 3.5 billion workers in the world either eked out a living (or attempted to) in the informal economy—that is, swelled the ranks of surplus labor—or worked in precarious arrangements, including informal, flexible, part-time, contract, migrant, and itinerant work arrangements (ILO, 2019: 2–3). Over the past four decades globalization has brought a vast new round of global enclosures as hundreds of millions have been uprooted from the Third World countryside and turned into internal and transnational migrants. Some of the uprooted millions are super-exploited through incorporation into the global factories, farms, construction sites, and offices as precarious labor, while others are marginalized and converted into surplus humanity, relegated to a "planet of slums."

While the wave of technological innovation now underway may hold great promise for the long run, under global capitalism, the social and political implications of new technologies—developed within the logic of capital and its implacable drive to accumulate—point to great peril. In particular, these new technologies, ceteris paribus, will aggravate the forces driving overaccumulation and the expansion of the ranks of surplus humanity. They will enable the TCC and its agents to create nightmarish new systems of social control, hegemony, and repression, systems that can be used to constrain and contain rebellion of the global working class, oppositional movements, and the excluded masses—in short, the *global police state* (Robinson, 2020). Criminalization, often racialized, and militarized control become mechanisms of preemptive containment, converging with the drive toward militarized accumulation. Already, we may be seeing the breakdown of consensual domination and a rise of coercive systems of social control as strategies for surplus population management.

Even if a new period of digitally driven expansion displaces the structural crisis temporally into the future, global capitalism will continue to generate social crises of survival and well-being for billions of people. Worldwide, 50 percent of all people live on less than $2.50 a day and a full 80 percent live on less than $10 per day. One in three people on the planet suffers from some form of malnutrition, nearly a billion go to bed hungry each night, and another two billion suffer

from food insecurity. Refugees from war, climate change, political repression, and economic collapse already number into the hundreds of millions. The new round of digitally driven restructuring may turbo-charge the economy enough to usher in a period of rising profits and prosperity for the system as a whole even as millions—billions—sink into greater precariousness and desolation.

Hence, absent redistributive and regulatory reforms or state intervention to generate public or alternative forms of employment, digitally driven expansion will only aggravate the structural crisis of overaccumulation. The question then becomes one of class struggle and political contestation. Can mass struggle by the popular and working classes force on the system a measure of redistribution, reregulation, and social welfare investment that may offset the crisis into the future and give global capitalism a new lease on life? A "global spring" is breaking out all around the world.[3] From 2017 to 2019, more than one hundred major antigovernment protests swept the world, in rich and poor countries alike, toppling some thirty governments or leaders and sparking an escalation of state violence against protesters (Carnegie Endowment for International Peace, n.d.). However, this two-year period was but a peak moment in popular insurgencies that spread in the wake of the 2008 Great Recession, a veritable tsunami of mass rebellion not seen since at least 1968. Yet even if the global revolt manages to bring about a significant redistribution of wealth downward, global capitalism will still run up against the finite limits of the planetary ecosystem.

A Green New Deal, a call first put out in the United States, proposes combining sweeping green policies, including an end to fossil fuels, with a social welfare and proworker economy that would include mass employment opportunities in green energy and other technologies. A global Green New Deal may help lift the world out of economic depression as it simultaneously addresses the climate emergency and generates favorable conditions to struggle for a postcapitalist social order. In the larger picture, the technical infrastructure of the fourth industrial revolution is producing the resources in which a political and economic system very different from the global capitalism in which we live could be achieved. As many have noted, these technologies could be used to free us from the drudgeries of menial and dull work, drastically reducing socially necessary labor time and increasing leisure time. They may allow us to overcome obstacles that socialist-oriented economic planning in the twentieth century experienced once the price (market) mechanism of coordinating capitalist production had been suppressed. Under an entirely different social and economic system, we human beings could cease being slaves to machines and technologies employed for the purpose of exploitation and instead become masters of them. Then, we could build a global society based on an egalitarian democracy and material and spiritual well-being.

NOTES

1. Oxfam publishes annual reports on the state of global inequality. See interalia, Oxfam (2015, 2018, 2021).

2. The average growth of output per worker in the United States was 2.3 percent a year between 1891 and 1972. It was just 1.4 percent a year between 1972 and 1996, and 1.3 percent between 2004 and 2012, although it recovered historical levels between 1996 and 2004, corresponding roughly to the period in which computerized became generalized in industry and services. See Wolf (2015): 15–16.

3. I do not normally cite *Wikipedia*, but one entry has perhaps the most comprehensive list of major protests in the twenty-first century with links to original or other sources: https://en.wikipedia.org/wiki/List_of_protests_in_the_21st_century.

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20

Reimagining Globalization

Plausible Futures

James H. Mittelman

ABSTRACT

This chapter takes stock of the corpus of knowledge about reimagining globalization. It also proposes an analytical framework for discerning future globalizations. The framework consists of a set of dyadic markers: globalization and deglobalizaton. Between these rival narratives are four subnarratives: hyperglobalization, antiglobalization, alterglobalization, and reglobalization. Each subnarrative has moments when its appeal grows and then dips. In order to interrogate these powerful narratives, I examine historical trends, what explains them, and the extent to which they are objectified. This is a matter of who gets their story told. Whose and which knowledge comes into play?

Empirical evidence reveals that the levels of global connectedness lie somewhere between what the enthusiasts of hyperglobalization claim and what the proponents of deglobalization seek, amid deep and shallow globalization. The slowdown in the global economy in the 2020s does not signify a retreat from globalization. The data rather show sustained interconnectedness of nations and dependence on overseas suppliers. The combined effects of the coronavirus pandemic, supply-chain disturbances, Brexit, and the Ukraine War have brought both barriers to cross-border flows and inefficiencies, but not a sizable withdrawal from globalization. By all indications, the tides of globalization will continue to tack back and wash forward.

KEYWORDS

deglobalization, future studies, globalization, global political economy, neoliberal capitalism, reglobalization, scenarios

Coarsening political discourse, loss of civility within and among societies, diminishing confidence in political institutions, and unraveling of the social contract characterize our fraught times. We are ensconced in a state of acute social malaise, a pathological condition that began before the coronavirus pandemic. Its symptoms are morbidities of globalized capitalism in the twenty-first century. Wanting is sufficient creative reflection on reimagining a form of globalization that would serve human needs in a just and equitable manner.[1] Thinking anew about temporality and achieving an ethical future are sorely needed.

Reimagining the future requires exploring origination. A central question is, where does the past end, the present begin, and the future start? The answer lies in reckoning with not a dead but a living past. To this point, the novelist William Faulkner (1951: 92) famously commented, "The past is never dead. It is not even past." This relationship may be construed as a dialogue of how the past pushes into the present. The simultaneity of the current moment and the past as it bears on the future may kindle the power of imagination.

Toward this end, I want to take stock of the corpus of knowledge about reimagining globalization. I also propose, in a preliminary way, an analytical framework for discerning future globalizations. Certainly, entering the minefield of debates in futurology is a hazardous venture. History takes unexpected twists and turns. The unintended consequences of attempting to activate knowledge as a tool for shaping the future can be dire. This is a matter of who gets their story told. Whose and which knowledge comes into play? In my use of the term, knowledge is an instrument of power. Extant knowledge about reimagining globalization and converting possible alternatives into practice is contested, with evidence for enacting them pointing in different directions.

Since the future of globalization is not foreordained, how can we know where it is headed? Analysts disagree about ontology, epistemology, and methodology. Some researchers, most of them in the positivist tradition, feed data into computer models and use the results to try to calculate globalization's prospects. Other observers rely on intuition and turn to popular fiction to spark the imagination and unlock creative impulses. Still others, dialecticians and evolutionary thinkers, craft scenarios: extrapolations based on historical patterns and trend lines.

I adopt a combination of the second and third approaches, not linear or timeless interpretations, because, to my mind, the latter options have the greatest potential for deepening understanding. Scenarists offer plausible narratives, provoking the imagination, whereas forecasters and model builders claim that their method for planning the future is a science. In the conventional sense, the "scientific method" is faith in hard-edge empirical techniques. The problem is that it can be mechanistic: the peril lies in adopting a pseudo-scientific approach, one that employs a slot-machine methodology, superimposing an overarching template on varied conditions, making short shrift of the texture of historical and cultural conditions.

In critical usage, the payoff of pursuing scenarios lies in deriving lessons from the past, informing present-day policymaking, and propelling future responses to global crises. Keeping with this tradition, I will stake out stories and scenarios about globalization. Each one is a permutation of the core concept of globalization. The coming pages are organized around a set of dyadic markers, globalization and its counterpoint, deglobalization. They hover at opposite ends of a spectrum. Between these rival narratives are four subnarratives: hyperglobalization, antiglobalization, alterglobalization, and reglobalization. This political and economic repertoire is remarkably capacious and, to varying degrees, objectified.

MEANINGS

Globalization may be defined as a syndrome of transformative processes that compress time and space (Mittelman, 2000, 2004, 2011).[2] It is a historical transformation, with a profound impact on social and power relations. Accelerated by new technologies, globalization shrinks horizons and distances. Globalizing forces slice across national borders and touch down differently in myriad contexts. These structures are not entirely external to a given country or region. They are entwined with the domestic sphere. All locales and sundry institutions must respond to a constellation of globalizing pressures rooted in capital accumulation and the dynamics of competition.

From the early 1990s, scholar-activists created a competing narrative: deglobalization. Two variants of deglobalization may be compared. First, in a pioneering iteration, an avant-garde book titled *Delinking* (1990) by Samir Amin, an Egyptian-French intellectual, laid the groundwork for careful research on this path in multiple locales. A critic of culturalist understandings of capitalism and imperialism, Amin argues that Edward Said's highly acclaimed book *Orientalism* (1979) and postcolonial scholarship that followed in his tracks lacked sufficient emphasis on the material dimensions of exploitation. Amin's lacerating critique of Eurocentrism distinguishes delinking from autarky and withdrawal from the world industrial, trade, and financial systems. Delinking is a refusal to subordinate a national development strategy to the imperatives of globalization. It calls for a nation to steer its own course rather than adopt an externally prescribed route. In other words, delinking is a strategy for capturing control of a national economy—an autocentric program for reconstructing them. The goal at the global level is to work with allies to shape a polycentric system of power.

Amin and like-minded thinkers such as Walden Bello (2005), a Filipino professor and former member of the House of Representatives of the Philippines, advanced ideas for transforming a political economy with regard for the specificity

of individual countries. In Karl Polanyi's sense (1957), the aim is to re-embed the economy and institutions in society rather than to allow the economy to drive society. In this iteration of deglobalization, the guiding principle is to disengage from and then selectively redial into the global political economy.

To take one example: China has benefited from globalized capitalism by setting the conditions of engagement, including placing capital controls on foreign direct investment and targeting capital movements. Chinese authorities recognize the potential and limitations of this strategy and recognize the importance of their large domestic market and the far reaches of the territory. At this stage, China seeks to gain greater autonomy and manage the flow of imports, especially financial services.

In another account of deglobalization, populists on the Right have formulated nationalist economic agendas. Among them, protectionists like India's prime minister Narenda Modi favor restructuring terms of trade, levying tariffs, and safeguarding the domestic economy. These moves resemble similar developments in the Global North, where diverse economic nationalists would use the national state as a shield or barrier to constrain globalization. They are mindful that increased globalization generates winners and losers.

Strikingly, some of those left behind support illiberal, authoritarian regimes that champion deglobalization, promulgate official narratives, and construct imaginary futures. By and large, these groups yearn for a muscular leader who would restore the putative strong nation and revive its pride. They call for restrictions on immigration and are hard on minorities on the grounds that they are replacing the dominant majority—in the West, white Christians. Their actions unleash waves of violence against Muslims, Jews, Asians, the disabled, LBGTQ people, and others. Many political officials and parents support clamping down on allegedly misguided school curricula, such as teaching "critical race theory." All these developments comport with a bevy of national protectionist measures imposed on globalization. Taken together, this constellation of forces evokes images of Germany in the 1930s, though there are major differences too, and the historical comparison should not be overdrawn.

The deglobalization scenario is evolving in full view in the 2020s. Emblematic of this scenario, the coronavirus led to pandemic lockdowns in Shanghai and other locales, reducing global transactions. Meanwhile, the 2022 Ukraine War generated a new wave of protectionism. Governments sought to secure commodities for their citizens, built barriers so as to harness exports, and incentivized businesses to reshore their factories. Barriers cascaded from country to country and sanctions on Russia further hampered supply chains. China added export restrictions on fertilizers and food crops (Swanson, 2022), which compounded shortages of supplies and amplified deglobalization. As indicated below, imaginaries and narratives are vital components of these developments.

IMAGINARIES AND NARRATIVES

Important insights derive from the idea that political communities are built by imagining solidarities. Historically, they coincided with the emergence of print capitalism. Benedict Anderson (1999) posited that this phenomenon is linked to the rise of the nation-state. He tracked this trend and enriched understanding of how the world is structured.

Subsequently, globalization researchers (e.g., Steger, 2008) have drawn on Anderson's and Charles Taylor's (2003) influential works on imaginaries and offered poignant criticism of what they call *methodological nationalism*, that is, primarily focusing on the state system to the neglect of other levels of inquiry. Closely related, *methodological territorialism* is a tendency to reify territorial boundaries and national sovereignty without sufficiently taking account of the ways in which globalizing forces penetrate national jurisdictions. For instance, the Chinese authorities sought to shut down reports from outside sources about the 1989 Tiananmen Square massacre. In this episode, the state cracked down on protests over economic and political reforms but could not block a sizable amount of information from entering the country. Similarly, the government has limited ability to stop cultural influences brought by education, tourism, music, and art. The point is that it is misguided to dwell on the state system without grasping the surge in cross-border flows interlinking political, economic, and cultural communities. At a level either ignored or downplayed by methodological nationalists, *global* imaginaries merit more attention than they have received. National and global imaginaries alike are representations. They are ways of perceiving identities and bonds.

It cannot be stressed too strongly that the field of *international* studies is based on the premise of territoriality. Yet, with the development of innovative technologies, especially in communications and transportation, the advent of "network society" (Castells, 1996) and the emergence of a "nonterritorial region" (Ruggie, 1993), there is a shift toward a deterritorialized world. On these grounds, Jan Aart Scholte challenged "methodological territorialism"—the ingrained practice of formulating questions, gathering data, and arriving at conclusions, all through the prism of a territorial framework (1996; 1999: 17; 2005). Without swinging to the opposite extreme of adopting a "globalist methodology" by totally rejecting territoriality, Scholte calls for a "full-scale methodological reorientation," and concludes: "that globalisation warrants a paradigm shift would seem to be incontrovertible" (1999: 21–22).

To probe further into prevalent ways of thinking and talking about how globalization is unfolding, I will illuminate powerful narratives. By narrative power, I mean the ability to spin stories about historical events and what accounts for them. Narrators impart understanding of events and enable judgments.

In this vein, Robert Shiller, a Nobel Prize-winning economist, holds that narratives are "major vectors of rapid change in culture, in zeitgeist, and in economic behavior" (2019). He argues that narratives need to be incorporated into economic theory, for the ideas they convey can spread by contagion and transform economic behavior. But this begs the questions: which narratives should be selected, and why?

There are different versions of each one. Multifaceted, they comprise subnarratives and are fluid rather than fixed. Established narratives encompass clusters of stories, which may need to be elaborated. In other words, narratives are divided and include several ingredients and branches. Moreover, narratives are contested—for instance, social movements, philanthropies, and corporations are forging their own social justice narratives—and beget dueling subnarratives.

FOUR KEY SUBNARRATIVES AND GLOBAL INDICATORS

Emblematic of ways that globalization is being reimagined, I will interrogate the four key subnarratives mentioned in the introduction to this chapter: *hyperglobalization, antiglobalization, alterglobalization*, and *reglobalization*. The discussion then turns to global indicators and an illustration of how these stories are deployed in global crises.

The Subnarratives

Contending subnarratives have emerged because the tides of globalization tack back and wash forward. It is impossible to trace a neat progression. Yet analysts can toggle between advances and retreats, tensions and challenges that spawn the four subnarratives.

The first one is widely deployed by governance agencies as well as by scholars and policy intellectuals. The subnarrative of hyperglobalization depicts acceleration in cross-border flows of capital, technology, population, and cultural products. Its purveyors call attention to the degree to which the speed and reach of contemporary economic globalization differ significantly from the pace and expanse of earlier phases of globalization. Hyperglobalists examine the costs and benefits of trade integration, the consolidation of markets, and heightening global competition, as well as their political implications, including the reduction of national sovereignty and what deterritorialization means for national democracy. The hyperglobaliztion subnarrative has its enthusiasts (Ohmae, 1990), critics (Sassen, 1996), and revisionist commentators (Rodrik, 1997).

Hyperglobalist rhetoric is powerful because it has influenced many policymakers and civil society groups. But it is a trope inasmuch as the trend that this worldview purports to delineate cannot be proven to exist. In fact, it exaggerates certain

tendencies without giving due weight to countertendencies such as heightened divergence (e.g., in income inequality and cultural differentiation), disintegrative processes, and resistance to global convergence.

Partly owing to the extent to which the scope and scale of neoliberal globalization have disrupted ways of life and recalibrated who wins and loses in the global political economy, pronounced backlashes have emerged. They materialized at the World Trade Organization (WTO) ministerial meeting in Seattle in 1999, followed by protests at the annual meetings of the International Monetary Fund and the World Bank in Washington, DC, in 2002, and several other global summits.

In the second subnarrative, these demonstrations are described as manifestations of antiglobalization, a trope that has become commonplace in the media and popular writing. By slotting the wide range of stances on globalization in two boxes—for and against—it obscures an assortment of complaints about globalizing trends that emanate from different locales and diverse positions on the political continuum. What becomes obscure are the varied attempts to engage, not evade, globalization. In fact, most of this resistance is *against* aspects of neoliberalism and *for* globalization such that it should serve social ends. In this sense, the resistance is neither *anti*globalization nor *pro*globalization. Some social movement activists on the Left *and* proponents of free trade, such as Milton Friedman, advocate abolishing the international financial institutions themselves; others like billionaire financier George Soros want to change the direction of policy; and still others seek to transform the underside of globalization—capitalism—specifically, the relationship between market power and political authority.

Few objectors have donned an antiglobalization stance. They are not opposed to globalization per se. Rather, they advocate some aspects of globalization—more information, improved technology, productivity gains, and a cornucopia of consumer goods—but not others, namely, its baneful effects, including an increase in precarious employment and outsourcing jobs. The target of legions of protestors is the coupling of globalization and a neoliberal policy framework.

The prevalent imagery of antiglobalization is problematic too, because it defines a phenomenon solely as a negation. It impoverishes social criticism by mystifying what may be learned from robust debates over globalization without regard for what may be positive and affirmative about it. Pigeonholing social criticism as antiglobalization hampers the creation of alternatives. At the venues where public protests have taken place, mass movements have raised serious issues about the drawbacks to neoliberal globalization and opportunities for altering it.

Third, many critics are etching possibilities for a just, inclusive, participatory, and democratic globalization. It is upon these goals that the alterglobalization movement—for which a common metonym is *global social justice movement*—is based. Although the exact origins of the term *alterglobalization* are uncertain, its usage in French (*altermondialisation*) dates from the late twentieth century and has circulated throughout Europe and elsewhere. This social movement is for alterglobalization when it means an attempt to reshape globalizing forces so as to

mitigate their harms and distribute their opportunities in a just manner. Activists serving as propellants of alterglobalization have forged points of articulation. At the World Social Forum (WSF), in particular, networks built on earlier initiatives come together to share ideas about establishing alternatives to neoliberal globalization (Falk, 1999; Gills, 2008; Mittelman, 2004; Patomäki & Teivainen, 2004; Teivainen, 2004). While the WSF has opened political space for civil society, it remains small-scale and without appreciable forward momentum (Patomäki, 2022: 103–4).

The fourth permutation of the globalization narrative is known as reglobalization. An umbrella term, it is a reaction to nationalist populism. For some of its advocates, it is a pragmatic policy response starting at the national level and scaling up. For other reformists, reglobalization is a call for higher degrees of liberal multilateral cooperation through strengthening international institutions (e.g., Payne, 2017; Bishop & Payne, 2021; Benedikter, Gruber, & Kofler, 2022). For still others, it is a normative aspiration for transitioning to "post-neoliberal" globalization.

Reglobalization subsumes specific themes and steps. Emphases range from the economy and environment (Habicher, 2020) to technology and cultural flows (Jamet, 2020; Steger, 2021). The reglobalization subnarrative stresses ways that the pandemic has both slowed certain transnational flows such as intercontinental trade and spurred innovation, as with the globalization of services and digitalization. The difficulty is that the term *reglobalization* is imprecise. This catchword covers diverse developments and parks them under a single rubric. For reglobalization to enter the common lexicon and become a galvanizing narrative, its promoters need to sharpen this discourse and add nuance. To be credible and gain a following, this supposedly late- or post-COVID-19 trend must track more than a brief time span.

Evidence

In a 2020 paper, Daniel Esser and I sought to pin down which narrative and subnarratives are objectified (Esser & Mittelman, 2020). We juxtaposed two influential global indices, the KOF Globalization Index issued by the Swiss Economic Institute (2018a) and the DHL Global Connectedness Index (Altman, Ghemawat, & Bastian, 2018), compiled by New York University and the Barcelona-based IESE business schools, respectively. In 2022, I revisited the KOF and DHL indices, which incorporate data through 2019.

For the sake of brevity, I will focus on these two indices only, because from one study to another, the data and conclusions drawn from indicators are highly variable. Much depends on the indicator providers. Who are they? How are they trained? To whom are they accountable? How and by whom are they paid? But I digress.[3] Returning to the KOF Index (KOF Swiss Economic Index, 2018b), worldwide globalization increased between 1990 and 2007, but, as one would expect, slowed during the 2008 financial crisis and the recession that followed.[4] Despite a slight uptick in 2016, aggregate economic globalization, including financial

globalization, flat-lined between 2018 and 2019, and cross-border trade ebbed. Financial globalization then mounted, and trade integration similarly advanced; yet population flows, particularly in the tourism sector, declined.[5]

The DHL Index demonstrates that, for the world as a whole, the extent of global connectedness crested at a record high in 2017. The DHL finds that a large portion of flows of trade, capital, information, and people is domestic rather than cross-border. Empirical evidence reveals that the levels of global connectedness lie somewhere between what the enthusiasts of hyperglobalization claim and what the proponents of deglobalization seek, amid deep and shallow globalization.

The 2022 indices do not deviate substantially from prior findings. Overall global connectedness again varies considerably by both country and region, not only for those on the low end of tallies of globalization indicators but also for those at the top.

The downturn in the global economy and disruptions in supply chains due to the coronavirus pandemic do not signify a retreat from globalization. These patterns rather show sustained interconnectedness of nations and dependence on overseas suppliers. The combined effects of the pandemic, supply-chain disturbances, and Brexit have brought both blockages and inefficiencies. The contraction in global trade and relocalizing production have boosted costs. Rethinking these issues and taking into account the magnitude of the adverse consequences of adjustments in global economic interdependence may give impetus to instituting reforms, the scope of which is unforeseeable. Yet globalization continues apace; the rate varies by type and dimension. Central to these developments will be the elaboration of narratives, some of them grounded in false, others in accurate, information.

As heated controversies over disinformation illustrate, numbers—global indicators, censuses, and vote counting—are decidedly politicized rather than scientifically generated. Numerical indicators are statistical representations that can be gamed by their authors and promoters. If they eclipse Indigenous ways of producing knowledge in the Global South, datasets can become a form of epistemic displacement and accretion.

That said, can a principal globalization narrative and subnarrative be identified? With the worldwide spread of neoliberalism over the last half-century, each subnarrative has moments when its appeal grows and then dips, with uneven evidence to sustain the stories they tell. They can be simultaneously deployed in actual instances.

The Present

For illustrative purposes, let's take the case of momentous upheavals in the 2020s. Discourse brokers marshaled official and unofficial subnarratives, including many falsehoods, during this period. Noting the coronavirus's uncertain long-term impact, Laurence Boone, the chief economist at the Organization for Economic Cooperation and Development, observed that the pandemic and the 2022 Russian

invasion of Ukraine unleashed "deglobalization forces" as a result of the imposition of new Western sanctions, the slowdown in growth and financial flows, delays in delivering supplies of commodities, and the deterioration of the environment.

Blocking the Russian central bank's transactions from SWIFT, a network for financial transactions and payments between banks globally, is a major element in delinking. In response to this measure, Russia took steps to wall off from pressures and tried to make itself more self-sufficient.

At the same time, some policymakers and narrators are calling for more, not less, global integration. Ngozi Okonjo-Iwaeala, director general of the WTO, advocated reglobalization. In her words: "Deeper, more diversified international markets remain our best bet for supply resilience" (quoted in Wong & Swanson, 2022). Adding to this contention over subnarratives, Harvard political economist Dani Rodrik remarked: "Your interdependence can be weaponized against you." Elaborating, he asserted that the Ukraine War has "probably put a nail in the coffin of hyperglobalization" (quoted in Wong & Swanson, 2022).[6]

THE LONGUE DURÉE

In sum: to order raging debates over the future of globalization and facilitate diagnosing strivings for a just order, this chapter offers a conceptual framework for reimagining globalization. The conceptualization consists of a matrix of two narratives, globalization and deglobalization, and four subnarratives: hyperglobalization, antiglobalization, alterglobalization, and reglobalization.

The imagined beyond conspires against the pragmatic, the here and now. It requires stretching time, seeing what is not entirely manifest, grasping what is latent. The challenge is to create a shared vision of an ethically right and politically wise world order. It requires gazing beyond the urgency of the present.

History is embarked in a liminal phase, entering an interim—a transition from a near term—to the more distant future. That is to say, the longue durée is not merely one undifferentiated, indeterminate period.

The path to the far term presents concrete challenges. Contingent conditions must be assessed and addressed. They include:

1. COVID-19 is a perfect global transgressor in the sense that it prompted a reassertion of borders and national efforts to check cross-border flows.
2. The coronavirus pandemic boosted innovations in digital communications technologies that enabled delocalized work across time zones and borders.
3. Shortages in commodities emanating from disruptions in supply chains exacerbated pressure brought by the Ukraine War. They also augmented demands for local sourcing and domestic production.
4. The movement of populations caused by military and political conflicts reveals the increasing importance of empathy, compassion, and toleration

of differences—more so because climate change in Central America and elsewhere continues to spawn migratory flows.

5. The specter of nuclear threat, whether deliberately or fortuitously invoked, haunts the global future.

Following the near future, when these looming challenges must be faced, the opportunity for actualizing far-reaching scenarios will be on the horizon. At that time, reimagining globalization could spur efforts to establish counterhegemony: a historical bloc that confronts the dominant form of globalization in what Antonio Gramsci (1971) called a "war of position." Strategically, it is to be waged by an avant-garde movement that relies on persuasion through education, the media, music, art, and writing devoted to opposing and eventually ousting the hegemon. It presupposes participation in this political project by subaltern classes, which endeavor to secure consent.

Organic intellectuals can play an integral role in this struggle by propagating a common culture, enabling cohesion. This project is particularly important for organic intellectuals engaged on the battleground of ideas. Those based in the academy can contribute significantly by bolstering efforts to reimagine globalization. A vibrant field of teaching and research, globalization studies is an extension of the long history of civic education, which is intensely contested in the public arena. An abundance of initiatives are underway, a lot has been accomplished, and much more remains to be done.

NOTES

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1. I am drawing on an incisive intervention by Robert W. Cox (1976) and want to acknowledge Matthew Louis Bishop and Anthony Payne's (2021) important contribution.

2. This succinct conceptualization is closely linked to the work of proto-globalization theorists such as the philosopher and media specialist Marshall McLuhan (1964), who coined the expressions "the media is the message" and "global village." Pioneering formulations in globalization studies followed: among them, Giddens (1990); Harvey (1990); Robertson (1992); Sassen (1996); Scholte (2005), and Steger (2008). In parallel, Steger and James (2017) trace the genealogy of globalization research.

3. I explore these issues elsewhere (Mittelman, 2022).

4. Gygli et al. (2019).

5. See Gygil et al. (2019). The KOF Swiss Economic Institute (2018c) defines political globalization at two levels. De jure dimensions include the number of international, intergovernmental organizations of which a country is a member, the number of international treaties ratified since 1945, and the number of treaty partners. The de facto dimensions are constituted by the number of embassies, the personnel assigned to peacekeeping missions, and internationally oriented nongovernmental organizations operating in a country.

6. For more on the weight of the present on the past and implications for the future, see Tabb (2021).

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