

Contemporary Sociological Theory and Its Classical Roots

The Basics

THIRD EDITION

George Ritzer

University of Maryland





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CHAPTER 10

Globalization Theory

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It is likely that no single topic has received as much popular and academic attention in recent years as globalization. In fact, the academic concern is motivated, in large part, by the extraordinary public importance of, interest in, and worry over, globalization. However, there are also reasons internal to the academic world (e.g., reactions against early and narrow approaches to what is now called globalization) that have led to this near-obsession with this topic. Social theorists, including many of those discussed in this chapter and elsewhere in this book, have been no exception to this trend toward a focal concern with globalization. It is beyond the scope of this chapter to offer anything like a complete overview of the voluminous work of social theorists on this topic, let alone a review of the entire literature on globalization. What follows is a brief overview of some of the most important theoretical work on globalization.

Virtually every nation and the lives of billions of people throughout the world are being transformed, often quite dramatically, by globalization. The degree and significance of its impact can be seen virtually everywhere one looks, most visibly in the now common protests that accompany high-level meetings of such global organizations as the WTO (World Trade Organization) and IMF (International Monetary Fund). As both the magnitude of the issues before these organizations and the level of protest against them make clear, people throughout the world feel strongly that they are confronting matters of great moment.

Globalization theory also emerged as a result of a series of developments internal to social theory, notably the reaction against such earlier perspectives as modernization theory. Among the defining characteristics of this theory were its Western bias, the pre-eminence accorded to developments in the West, and

the idea that the rest of the world had little choice but to become increasingly like it. While there are many different versions of globalization theory, there is a tendency in virtually all of them to shift away dramatically from a focus on the West (including and especially the United States) and to examine transnational processes that not only flow in many different directions, but also those that are, at least to some degree, autonomous and independent of any single nation or area of the world (see discussion of Appadurai's work below).

Globalization can be analyzed culturally, economically, politically, and/or institutionally. For each, a key difference is whether one sees increasing homogeneity or heterogeneity. At the extremes, the globalization of culture can be seen as the transnational expansion of common codes and practices (homogeneity) or as a process in which many global and local cultural inputs interact to create a kind of pastiche, or a blend, leading to a variety of cultural hybrids (heterogeneity). The trend toward homogeneity is often associated with **cultural imperialism**, or, the influence of a particular culture on a wide range of other cultures. There are many varieties of cultural imperialism including those that emphasize the role played by American culture, the West, or core countries. Among many others, Roland Robertson, although he doesn't use the term *cultural imperialism*, opposes the idea through his famous concept of glocalization (see below) in which the global is seen as interacting with the local to produce something distinctive—the glocal.

Theorists who focus on *economic* factors tend to emphasize their growing importance and homogenizing effect on the world. They generally see globalization as the spread of the market economy throughout many different regions of the world. For example, some have focused on globalization and the expansion of trade. Recently, George Stiglitz, a Nobel Prize-winning economist and former chairman of the Council of Economic Advisors, issued a stinging attack on the World Bank, the World Trade Organization (WTO), and especially the International Monetary Fund (IMF) for their roles in exacerbating, rather than resolving, global economic crises. Among other things, Stiglitz criticizes the IMF for its homogenizing, "one-size-fits-all" approach that fails to take into account national differences. The IMF in particular, and globalization in general, have worked to the advantage of the wealthy nations, especially the United States (which effectively has veto power over IMF decisions), and to the detriment of poor nations; the gap between rich and poor has actually *increased* as a result of globalization.

While those who focus on economic issues tend to emphasize homogeneity, some differentiation (heterogeneity) is acknowledged to exist at the margins of the global economy. Indeed, Stiglitz argues for the need for more differentiated policies by the IMF and other global economic organizations. Other forms of heterogeneity in the economic realm involve, for example, the commodification of local cultures and the existence of flexible specialization that permits the tailoring of many products to the needs of various local specifications. More

cultural imperialism The influence of a particular culture on a wide array of other cultures.

Key Concept Globalization

Globalization is increasingly omnipresent. We are living in *a*—or even *the*—“global age.” Globalization is clearly a very important change; it could even be argued that it is *the most important change in human history*. This is reflected in many domains, but particularly in social relationships and social structures, especially those that are widely dispersed geographically. **Globalization** can be defined as: a transplanetary process or set of processes involving growing multidirectional flows of increasingly liquid people, objects, places, and information and the structures they encounter and create that are barriers to, or expedite, those flows.

On the one hand, the emphasis in this definition is on movement—multidirectional processes and flows of various phenomena that have become increasingly liquid in the contemporary world. People move around the world more easily (as tourists, migrants), objects travel easily and quickly because of companies like Federal Express, places move everywhere (McDonald’s in well over one hundred countries in the world), and information moves most easily and quickly of all via the Internet.

On the other hand, there are various structures that are also important globally. Some of those structures help in the flow of various phenomena. For example, established routes for airlines help them move throughout the world (and serve to prevent mid-air collisions) and illegal migrants follow well-established tracks from, for example, Central and South America through Mexico and then to the United State. However, other structures serve to slow down or even stop various global flows. The borders of nation-states and passport and customs controls are examples of such structures.

Overall, in thinking about globalization we need to focus on that which is in motion—processes, flows, liquids—as well as the more stationary structures that either expedite or impede those flows.

generally, those who emphasize heterogenization would argue that the interaction of the global market with local markets leads to the creation of unique “glocal” markets that integrate the demands of the global market with the realities of the local market.

Political/institutional orientations, too, tend to emphasize either homogeneity or heterogeneity. For example, some of those who operate with a homogenization perspective in this domain focus on the worldwide spread of models of the nation-state and the emergence of similar forms of governance throughout the globe; in other words, the growth of a more-or-less single model of governance around the world. More broadly, there is a concern with the global influence of a multiplicity of institutions. As we will see, some see the growth of transnational institutions and organizations as greatly diminishing the power of both

globalization A transplanetary process or set of processes involving growing multidirectional flows of increasingly liquid people, objects, places, and information and the structures they encounter and create that are barriers to, or expedite, those flows.

Key Concept—Continued

In contrast to many other definitions of globalization, the one offered here does *not* assume that greater global integration is an inevitable component of globalization. That is, globalization *can* bring with it greater integration (especially when things flow easily), but it *can* also serve to reduce the level of integration (when structures are erected that successfully block flows).

A term that is closely related to globalization is *transnationalism*, which involves the interconnection of individuals and social groups across the borders of specific nation-states. This is closely related to the idea of *transnationality*, or the development of communities, identities, and relationships that are not limited to a single nation-state.

Globalization and transnationalism are often used interchangeably. However, transnationalism is limited to interconnections that cross geo-political borders, especially those associated with nation-states, while globalization includes such connections, but is not restricted to them and encompasses a far wider range of transplanetary processes. Further, geo-political borders are only one of the barriers encountered, and often overcome, by globalization.

Some phenomena, labor unions for example, are better thought of as transnational rather than as global. That is, the cross-border relationship between labor unions that exist in two or more nation-states is more important than the global labor movement. Transnationalism is most often used in thinking about, and doing research on, immigrants who move from one country to another, but who continue to be involved in various ways with the country from which they came.

the nation state and other, more local, social structures to make a difference in people’s lives. One of the most extreme views of homogenization in the political realm is Benjamin Barber’s thinking on “McWorld,” or the growth of a single political¹ orientation that is increasingly pervasive throughout the world.

Interestingly, Barber also articulates, as an alternative perspective, the idea of “Jihad”—localized, ethnic, and reactionary political forces (including “rogue states”) that involve an intensification of nationalism and that lead to greater political heterogeneity throughout the world. The interaction of McWorld and Jihad at the local level may produce unique, glocal political formations that integrate elements of both the former (e.g., use of the Internet to attract supporters) and the latter (e.g., use of traditional ideas and rhetoric).

While the issue of homogenization/heterogenization cuts across a broad swath of globalization theory, it is clearly not exhaustive. That will become clear in the following discussion of major theories of globalization that certainly touches in various ways on homogenization/heterogenization, but also highlights a number of other facets of globalization theory. This discussion will be divided into four sections. First, we will look at the perspectives on globalization of some of the major contemporary theorists (Giddens, Beck, and Bauman) encountered earlier in this book. Then, we will turn to three broad categories of theorizing globalization—cultural, economic, and political/institutional.

Key Concept Civil Society

The major figure in social theory associated with the idea of civil society is Alexis de Tocqueville (see Chapter 1). Tocqueville lauded the early American propensity to form a wide range of associations (e.g., religious, moral) that were *not political* in nature and orientation. Such civil associations allowed people to interact with one another and to develop, renew, and enlarge feelings, ideas, emotions and understandings. These civil associations also allowed people to band together and to act in concert with one another. Without such associations they would be isolated and weak in large-scale contemporary societies.

The United States (and the West more generally) often conquered the world through uncivilized, even violent, means (colonialism, imperialism). However, it also played a major role in creating many of the elements of civil society such as a free press, written constitutions, religious tolerance, human rights, etc. A robust civil society was already in existence by the nineteenth century and early twentieth century (e.g., peace societies, cooperatives, workers' movements), but it was soon set back dramatically by the two world wars. It is largely in the aftermath of World War II that modern civil society took shape and expanded dramatically.

Central importance is accorded to the 1970s and 1980s, especially in Latin America and Eastern Europe. In both regions, there was opposition to military dictatorship and efforts to find an autonomous and self-organizing base outside of the state in order to oppose the military. It was also during this period that civil society became increasingly global as improved travel and communication made linkages among various civil society groups throughout the world increasingly possible. These groups mounted appeals to international authorities and were able to create a global political space for themselves where they argued for, and helped bring about, international agreements on such issues as human rights. Of great importance in the 1990s was the emergence of global activists who came together in an effort to deal with land mines, human rights, climate change, and HIV/AIDS.

Civil society is the process through which individuals deal with political and economic authorities in a wide variety of ways. It is a realm in which people can

Key Concept—Continued

engage each other more or less directly and in which they can, among other things, analyze and criticize their political and economic institutions. People can do this, and thereby act publicly, by acting through a variety of voluntary associations, social movements, political parties, and labor unions. Thus, civil society involves *both* settings and actions that take place within those settings. It also represents an ideal toward which many people and groups aspire—an active, vital, and powerful civil society that can influence, and act as a counterbalance to, the polity and the economy. It is particularly the case that civil society stands as a counterbalance and an alternative to *both* the nation-state and the economic market, especially the neo-liberal capitalist market.

While civil society was linked historically to groups and actions within states, in more recent years it has been associated with more global actions and organizations (e.g., international nongovernmental organizations: INGOs). In other words, we have moved increasingly toward a global civil society, although civil society remains a force within states and societies, as well. Global civil society is nongovernmental, a form of society composed of interlinked social processes, oriented to civility (nonviolence), to being pluralistic (including the strong potential to reduce conflict), and to being global.

A number of factors are involved in the recent rise of civil society in general, and INGOs in particular. Perhaps the most important are various global flows (see Key Concept: Globalization) including flows of both resources (money, information, popular culture, etc.) and threats (e.g., pollution, drugs, sex trafficking). As the power of the nation-state to deal with these flows, and in the case of negative flows, to mitigate or prevent them, has declined, the role of civil society in general, and of myriad INGOs in particular, has grown. Among the most notable of these INGOs are CARE, Worldwide Fund for Nature, Greenpeace, Amnesty International, Friends of the Earth, *Medecins Sans Frontières*, Oxfam, and so on. Perhaps of greatest importance today in civil society are groups that represent the poor, especially those in less-developed countries, and their efforts to improve the position of the poor within the global economy.

MAJOR CONTEMPORARY THEORISTS ON GLOBALIZATION

Anthony Giddens on the “Runaway World” of Globalization

Giddens' views on globalization are obviously closely related to, and overlap with, his thinking on the juggernaut of modernity (see Chapter 5). Giddens also sees a close link between globalization and risk, especially the rise of what he calls manufactured risk. Much of the runaway world of globalization is beyond our control, but Giddens is not totally pessimistic. We can limit the problems created by the runaway world, but we can never control it completely. He holds

out some hope for democracy, especially international and transnational forms of democracy such as the European Union.

Giddens emphasizes the role of the West in general, and the United States in particular, in globalization. However, he also recognizes that globalization is a two-way process, with America and the West being strongly influenced by it. Furthermore, he argues that globalization is in the process of becoming increasingly decentered with nations outside the West playing an increasingly large role in it. He also recognizes that globalization has both undermined local cultures *and* served to revive them. And he makes the innovative point that globalization “squeezes sideways” producing new areas that may cut across nations. He offers as an example an area around Barcelona in Northern Spain that extends into France.

A key clash taking place at the global level today is that between fundamentalism and cosmopolitanism. In the end, Giddens sees the emergence of a “global cosmopolitan society.” Yet even the main force in opposition to it—traditionalism—is itself a product of globalization. Furthermore, fundamentalism uses global forces (e.g., the mass media) in order to further its ends. Fundamentalism can take various forms—religious, ethnic, nationalist, political—but whatever form it takes, Giddens thinks that it is problematic, both because it is at odds with cosmopolitanism and because it is linked to violence.

Ulrich Beck and the Politics of Globalization

We can get at the essence of Beck’s thinking on this issue by discussing his distinction between globalism and globality. **Globalism** is the view that the world is dominated by economics and that we are witnessing the emergence of the hegemony of the capitalist world market and the neoliberal ideology that underpins it. To Beck, this view involves both monocausal and linear thinking. The multidimensionality of global developments—ecology, politics, culture, and civil society—is wrongly reduced to a single economic dimension. And that economic dimension is seen, again erroneously, as evolving in a linear direction of ever-increasing dependence on the world market. Clearly, Beck sees the world in much more multidimensional and multidirectional terms. In addition, he is very sensitive to the problems associated with the capitalist world market including the fact that there are all sorts of barriers to free trade and that there are not just winners in this world market, but also (many) losers.

While Beck is a critic of globalism, he sees much merit in the idea of **globality** in which closed spaces, especially those associated with nations, are growing increasingly illusory. They are growing illusory because of globalization, which involves transnational actors, with varying degrees of power, identities, and the like, criss-crossing and undermining nation-states. These transnational processes are not simply economic, but also involve ecology, culture, politics, and civil society. Such transnational processes traverse national borders rendering them porous, if not increasingly irrelevant: Nothing is any longer limited to the local. That which takes place locally, including both advances and catastrophes, affects the entire world.

While transnational processes have long existed, globality is new for at least three reasons. First, its influence over geographic space is far more extensive than ever before. Second, its influence over time is far more stable; it is of continual influence from one time to another. Third, there is far greater density to its various elements including transnational relationships and networks.

globalism The monocausal and unilinear view that the world is dominated by economics and that we are witnessing the emergence of the hegemony of the capitalist world market and the neoliberal ideology that underpins it.

globality The view that closed spaces, especially those associated with nations, are growing increasingly illusory in the era of globalization.

Zygmunt Bauman (1925–)

A Biographical Vignette

Zygmunt Bauman has had an interesting life and scholarly career. Born in Poland, he escaped the Nazis (he is Jewish) by fleeing with his family to Russia. He fought in the Polish army during World War II and by 1953 had risen to the rank of major before being relieved of his duties during a wave of anti-Semitism. He then turned to the social sciences and by 1968 had risen to become a professor at Warsaw University when he was again forced out of his position by anti-Semitism. He eventually ended up at the University of Leeds in England, where he proceeded to publish widely in English and became one of the leading social theorists of the day.

His first book in English appeared in 1972, and while he achieved significant recognition in the ensuing decades, his career really took off when in 1989 he published the landmark *Modernity and the Holocaust*, a book that argued that the Holocaust was not an aberration, but an expression of the essential nature of modernity. This critique of modernity led Bauman in the direction of postmodernity and postmodern social theory, which he engaged and adapted to his own orientation through the 1990s. More recently, he has increasingly become a public intellectual writing on a wide range of subjects, including globalization, but this has not prevented him from making new and original contributions to the scholarly literature such as his 2000 notion of “liquid modernity.”

Beck also lists a number of other things that are distinctive about globality in comparison to earlier manifestations of transnationality:

1. Everyday life and interaction across national borders are being profoundly affected.
2. There is a self-perception of this transnationality in such realms as the mass media, consumption, and tourism.
3. Community, labor, and capital are increasingly placeless.
4. There is a growing awareness of global ecological dangers and actions to be taken to deal with them.
5. There is an increasing perception of transcultural others in our lives.
6. Global culture industries circulate at unprecedented levels.
7. There is an increase in the number and strength of transnational agreements, actors, and institutions.

This leads Beck to refine his previously discussed thinking on modernity and to argue that globality, and the inability to reverse it, is associated with what he now calls “second modernity.” Above all, however, what defines the latter is the decline of the power of the nations and the national borders that went to the heart of “first modernity.” The central premise of first modernity is (was) that we live in self-enclosed nation-states. (Beck dismisses this as a “container theory” of society.) Thus globality, and second modernity, mean, most importantly, denationalization and, Beck hopes, the rise of transnational organizations and perhaps a transnational state.

Zygmunt Bauman on the Human Consequences of Globalization

Bauman sees globalization in terms of a “space war.” In his view, it is mobility that has become the most important and differentiating factor in social stratification in the world today. Thus, the winners of the space war are those who are mobile; able to move freely throughout the globe and in the process to create meaning for themselves. They can float relatively free of space and when they must “land” somewhere, they isolate themselves in walled and policed spaces where they are safe from the losers in the space war. The latter not only lack mobility but are relegated and confined to territories denuded of meaning and even of the ability to offer meaning. Thus, while the elite are likely intoxicated by their mobility opportunities, the rest are more likely to feel imprisoned in their home territories from which they have little prospect of moving. Furthermore, the latter are likely to feel humiliated by the lack of their own mobility and the sight of elites free to move about at will. As a result, territories become battlefields where the losers and winners of the space war face off in a very uneven conflict.

The winners can be said to live in time rather than space; they are able to span virtually every space quickly, if not instantaneously. In contrast, the losers can be seen as living in space. That space is beyond their control, heavy, resilient, resistant, untouchable, able to tie time down. However, it is important to distinguish among those who have at least some mobility. The **tourists** are on the move because they want to be. They are attracted by something, find it irresistible and move toward it. Then there are the **vagabonds** who are on the move because they find their environs unbearable, inhospitable for any number of reasons. The positive aspects of what we applaud as globalization is that which is associated with tourists, while an unavoidable side effect is that many others are transformed into vagabonds. However, most people exist between these two extremes. They are not only unsure exactly where they now stand, but wherever it is, they are not sure they will be in the same place tomorrow. Thus, globalization translates into uneasiness for most of us.

However, even the seeming winners in globalization—the tourists—have their problems. First, there is the burden associated with the impossibility of slowing down; it is hard to be always on the move and at high speed. Second, mobility means an unending string of choices and each choice has a measure of uncertainty associated with it. Third, each of these choices also carries with it a series of risks and dangers. Endless mobility and continual choice eventually become troublesome if not burdensome.

Given the globalization theories of some of today’s major social theorists, we turn to the major types of globalization theory, often with examples from other major social thinkers.

tourists Those on the move throughout the globe because they want to be.

vagabonds Those on the move throughout the globe because they find their environs unbearable, inhospitable for any number of reasons.

CULTURAL THEORY

Jan Nederveen Pieterse has identified three major paradigms in theorizing the cultural aspects of globalization, specifically on the centrally important issue of whether cultures around the globe are eternally different, converging, or creating new “hybrid” forms out of the unique combination of global and local cultures. Let us look at each of these paradigms and a representative example (or examples) of each.

Cultural Differentialism

Those who adopt this paradigm argue that there are lasting differences among and between cultures that are largely unaffected by globalization or any other bi-, inter-, multi-, and transcultural processes. This is not to say that culture is unaffected by any of these processes, especially globalization, but it is to say that at their core they are largely unaffected by them; they remain much as they always have been. In this perspective globalization only occurs on the surface with the deep structure of cultures largely, if not totally, unaffected by it. Cultures are seen as largely closed not only to globalization, but also to the influences of other cultures. In one image, the world is envisioned as a mosaic of largely separate cultures. More menacing is a billiard ball image, with billiard balls (representing cultures) seen as bouncing off others (representing other cultures). This is more menacing because it indicates the possibility of dangerous and potentially catastrophic collisions among and between world cultures.

This paradigm has a long history, but it has attracted increasing attention and adherents (as well as critics) in recent years because of two sets of current events. One is the terrorist attacks of September 11th and the subsequent wars in Afghanistan and Iraq. To many, these events were seen as the product of a clash between Western and Islamic culture and the eternal cultural differences between them. The other is the increasing multiculturalism of both the United States (largely the growth of the Hispanic population) and of Western European countries (largely the growing Muslim populations) and the vast differences, and enmity, between majority and minority populations.

The most famous, and controversial, example of this paradigm is Samuel Huntington’s *Clash of Civilizations and the Remaking of the World Order*. Huntington traces the beginnings of the current world situation to the end of the Cold War and the reconfiguring of the world from one differentiated on a political-economic basis (democratic/capitalist vs. totalitarian/communist) to one based on cultural differences. Such cultural differences are nothing new, but they were largely submerged (as in the old Yugoslavia and the differences between, among others, Serbs and Croats) by the overwhelming political-economic differences of the Cold War era. What we have seen resurfacing in the last two decades are ancient identities, adversaries, and enemies. Huntington uses the term **civilization** to describe the broadest level of these cultures

civilization The broadest domain of cultures and cultural identities; culture “writ large.”

and cultural identities (indeed, to him civilization is culture "writ large"). What he sees is the emergence of fault lines among and between these civilizations, and this is a highly dangerous situation given the historic enmities among at least some of these civilizations.

Huntington differentiates between seven or eight world civilizations—Sinic [Chinese], Japan [sometimes combined with the Sinic as Far Eastern], Hindu, Islamic, Orthodox [centered in Russia], Western Europe, North America, along with the closely aligned Australia, New Zealand, Latin America, and (possibly) Africa. He sees these civilizations as differing greatly on basic philosophical assumptions, underlying values, social relations, customs, and overall outlooks on life. To Huntington, human history is in effect the history of civilizations, especially these civilizations. Civilizations share a number of characteristics including the fact that there is great agreement on what they are (although they lack clear beginnings and there are no clear-cut boundaries between civilizations which, nonetheless, are quite real). They are:

1. Among the most enduring of human associations (although they do change over time),
2. The broadest level of cultural identity (short of humanity in its entirety),
3. The broadest type of subjective self-identification,
4. Usually span more than one state (although they do not perform state functions),
5. Are a totality,
6. Are closely aligned with both religion and race.

Huntington offers a modern grand narrative of the relationships among civilizations. For more than 3000 years (approximately 1500 BC to AD 1500) civilizations tended to be widely separated in terms of both time and space. As a result, contacts among them tended to be nonexistent. When they occurred, they tended to be on a limited or intermittent basis and they were likely quite intense.

The next phase, roughly from 1500 to the close of World War II, was characterized by the sustained, overpowering, and unidirectional impact of Western civilization on all other civilizations. Huntington attributes this to various structural characteristics of the West including the rise of cities, commerce, state bureaucracy, and an emerging sense of national consciousness. However, the most immediate cause was technological especially in ocean navigation and the military, including a superior military organization, discipline and training, and, of course, weaponry. In the end, the West excelled in organized violence and while those in the West sometimes forget this, those in other parts of the world have not. Thus, by 1910, just before World War I, the world came closer, in Huntington's view, than at any other time in history to being one world, one civilization—Western civilization.

The third phase—the multicivilizational system—is traceable to the end of the expansion of the West and the beginning of the revolt against it. The period after World War I to about 1990 was characterized by a clash of ideas, especially capitalist and communist ideologies. With the fall of communism

the major clashes in the world now revolve around religion, culture, and ultimately civilizations. While the West continues to be dominant, Huntington foresees its decline. It will be a slow decline, it will not occur in a straight line, and it will involve a decline (at least relatively) in the West's resources—population, economic product, and military capability (traceable to such things as the decline of U.S. forces and the globalization of the defense industries making generally available weapons once available only, or largely, in the West). Other civilizations will increasingly reject the West, but they will embrace and utilize the advances of modernization, which can and should be distinguished from Westernization.

While the West declines, the resurgence of two other civilizations are of greatest importance. The first is the economic growth of Asian societies, especially Sinic civilization. Huntington foresees continuing growth of Asian economies that will soon surpass those of the West. Important in itself, this will translate into increasing power for the East and a corresponding decline in the ability of the West to impose its standards on the East. He sees the economic ascendancy of the East as largely traceable to the superior aspects of its culture(s), especially its collectivism in contrast to the individuality that dominates the West. Also helpful to the economic rise of the East are various other commonalities among the nations of the region (e.g., religion, especially Confucianism). The successes of Asian economies will not only be important in themselves, but also for the role they will play as models for other non-Western societies.

This first of Huntington's arguments is not that surprising or original. After all, we witnessed the dramatic growth of the post-World War II Japanese economy and we are now witnessing the amazing economic transformation of China. Few would disagree with the view that projecting present economic trends, the Chinese economy will become the largest in the world in the not-too-distant future. More controversial is Huntington's second major contention that involves the resurgence of Islam. While the Sinic emergence is rooted in the economy, Islamic growth is rooted in dramatic population growth and the mobilization of the population. This has touched virtually every Muslim society, usually first culturally and then socio-politically. It can be seen as part of the global revival of religion. It also can be seen as both a product of, and an effort to come to grips with, modernization.

Huntington goes beyond pointing to this development to paint a dire portrait of the future of the relations between the West and these other two civilizations, especially Islam. The Cold War conflict between capitalism and communism has been replaced by conflict that is to be found at the "fault lines" among and between civilizations, especially the Western, Sinic, and Islamic civilizations. Thus, he foresees dangerous clashes in the future between the West (and what he calls its "arrogance"), Islam (and its "intolerance"), and Sinic "assertiveness." Much of the conflict revolves around the West's view of itself as possessing "universal culture," its desire to export that culture to the rest of the world, and its declining ability to do so. Furthermore, what the West sees as universalism, the rest of the world, especially Islamic civilization, sees as imperialism. More specifically, the West wants to limit weapons proliferation, while

other civilizations want weapons, especially “weapons of mass destruction.” The West also seeks to export democracy to, even impose it on, other societies and civilizations that often resist it as part of the West’s idea of universal culture. And the West seeks to control and to limit immigration (especially from Islamic civilization), but many from those civilizations have found their way into the West, or want to be there. As this increases, Huntington sees cleft societies developing *within* both Europe and the United States (in the latter, fault lines will develop not only between Westerners and Muslims, but Anglos and Hispanics).²

What has earned Huntington numerous criticisms and the greatest enmity is his controversial statements about Islamic civilization and Muslims. For example, he argues that wherever Muslims and non-Muslims live in close proximity to one another, violent conflict and intense antagonism are pervasive. And Huntington puts much of the blame for this on Muslims and their propensity toward violent conflict. He argues that from the beginning, Islam has been a religion of the sword; it glorified military values and there is a history of Islamic conquest.³ The relationship between Islam and other civilizations has historically been one of mutual indigestibility. Of course, Western imperialism—often with Islam as a target—has played a key role in this. Islam also lacks a strong core state to exert control over the civilization. But of greatest importance to Huntington is the pressures created by the demographic explosion within Islam.

Huntington is concerned about the decline of the West, especially of the United States. He sees the United States, indeed all societies, as threatened by their increasing multicivilizational or multicultural character. For him, the demise of the United States effectively means the demise of Western civilization. Without a powerful, unicivilizational United States, the West is minuscule. For the West to survive and prosper, the United States must do two things. First, it must reaffirm its identity as a Western (rather than multicivilizational) nation. Second, it must reaffirm and reassert its role as the leader of Western civilization around the globe. The reassertion and acceptance of Western civilization (which would also involve a renunciation of universalism), indeed all civilizations, is the surest way to prevent warfare between civilizations. The real danger, for Huntington, is multiculturalism within the West and all other civilizations. Thus, Huntington ultimately comes down on the side of cultural continuity and something approaching cultural purity within civilizations. Thus, for him, at least in some ideal sense, globalization becomes a process by which civilizations continue to exist and move in roughly parallel fashion in the coming years. This constitutes a reaffirmation of the importance of civilization, that is, culture, in the epoch of globalization.

Cultural Convergence

While the previous paradigm is rooted in the idea of lasting differences among and between cultures and civilizations as a result of, or in spite of, globalization, this paradigm is based on the idea of globalization leading to increasing

sameness throughout the world. While thinkers like Huntington emphasize the persistence of cultures and civilizations in the face of globalization, those who support this perspective see those cultures changing, sometimes radically, as a result of globalization. The cultures of the world are seen as growing increasingly similar, at least to some degree and in some ways. There is a tendency to see global assimilation in the direction of dominant groups and societies in the world. Those who operate from this perspective focus on such things as “cultural imperialism,” global capitalism, Westernization, Americanization, and “McDonaldization.” At its extreme, globalization becomes Westernization, Americanization, and McDonaldization writ large.

Next, we will discuss two versions of this basic argument that is closely associated with my own work on this topic. However, a note of warning and clarification. While my work does focus on cultural convergence, it certainly does *not* argue that that is all that is happening in globalization or that local cultures are disappearing completely, or even necessarily being altered in some fundamental way. Rather, the argument is that there are global processes that are bringing the same or similar phenomena (e.g., McDonald’s restaurants in 120-plus countries in the world) to many parts of the world and, in that sense, there is cultural convergence. However, side-by-side with such global phenomena exist local phenomena (e.g., local open-air food markets or craft fairs) that continue to be vibrant and important. Furthermore, it may well be that the arrival of these global forms spurs the revival or development of new local forms. While the last two points are certainly meritorious, in accepting them we must not lose sight of the fact that some, perhaps a great deal, of cultural convergence, is also occurring (the spread of Wal-Mart into Mexico and other nations would be another example).

“McDonaldization” Although it is based on Max Weber’s ideas on the rationalization of the West (see Chapter 2), the McDonaldization thesis adopts a different model (Weber focused on the bureaucracy, but I concentrate on the fast-food restaurant), brings the theory into the 21st century, and views rationalization extending its reach into more sectors of society and areas of the world than Weber ever imagined. Of greatest concern in terms of this section is the fact that McDonaldization is, as we will see, a force in globalization, especially increasing cultural homogenization.

McDonaldization is the process by which the principles of the fast-food restaurant are coming to dominate more and more sectors of American society, as well as the rest of the world. The nature of the McDonaldization process may be delineated by outlining its five basic dimensions: efficiency, calculability, predictability, control through the substitution of technology for people, and, paradoxically, the irrationality of rationality.

McDonaldization The process by which the principles of the fast-food restaurant are coming to dominate more and more sectors of American society, as well as the rest of the world; in the latter sense, a form of cultural imperialism.

First, a McDonaldizing society emphasizes **efficiency**, or the effort to discover the best possible means to whatever end is desired. Workers in fast-food restaurants clearly must work efficiently; for example, burgers are assembled, and sometimes even cooked, in an assembly-line fashion. Customers want, and are expected, to acquire and consume their meals efficiently. The drive-through window is a highly efficient means for customers to obtain, and employees to dole out, meals. Overall, a variety of norms, rules, regulations, procedures, and structures have been put in place in the fast-food restaurant in order to ensure that *both* employees and customers act in an efficient manner. Furthermore, the efficiency of one party helps to ensure that the other will behave in a similar manner.

Second, great importance is given to **calculability**, to an emphasis on quantity, often to the detriment of quality. Various aspects of the work at fast-food restaurants are timed; this emphasis on speed often serves to adversely affect the quality of the work, from the point of view of the employee, resulting in dissatisfaction, alienation, and high turnover rates. Similarly, customers are expected to spend as little time as possible in the fast-food restaurant. In fact, the drive-through window reduces this time to zero, but if the customers desire to eat in the restaurant, the chairs may be designed to impel them to leave after about 20 minutes. This emphasis on speed clearly has a negative effect on the quality of the dining experience at a fast-food restaurant. Furthermore, the emphasis on how fast the work is to be done means that customers cannot be served high-quality food that, almost by definition, requires a good deal of time to prepare.

McDonaldization also involves an emphasis on **predictability**, meaning that things (products, settings, employee, customer behavior, etc.) are pretty much the same from one geographic setting to another and from one time to another. Employees are expected to perform their work in a predictable manner and, for their part, customers are expected to respond with similarly predictable behavior. Thus, when customers enter, employees ask, following scripts, what they wish to order. For their part, customers are expected to know what they want, or where to look to find what they want, and they are expected to order, pay, and leave quickly. Employees (following another script) are expected to thank them when they do leave. A highly predictable ritual is played out in the fast-food restaurant—one that involves highly predictable foods that vary little from one time or place to another.

efficiency The effort to discover the best possible means to whatever end is desired; a dimension of McDonaldization.

calculability An emphasis on quantity, often to the detriment of quality; a dimension of McDonaldization.

predictability Things (products, settings, employee, customer behavior, etc.) are pretty much the same from one geographic setting to another and from one time to another; a dimension of McDonaldization.

In addition, great **control** exists in a McDonaldized society and a good deal of that control comes from technologies. Although these technologies currently dominate employees, increasingly they will be replacing them. Employees are clearly controlled by such technologies as french-fry machines that ring when the fries are done and even automatically lift the fries out of the hot oil. For their part, customers are controlled both by the employees who are constrained by such technologies as well as more directly by the technologies themselves. Thus, the automatic fry machine makes it impossible for a customer to request well-done, well-browned fries.

Finally, both employees and customers suffer from the **irrationality of rationality** that seems inevitably to accompany McDonaldization. That is, paradoxically, rationality seems often to lead to its exact opposite—irrationality. For example, the efficiency of the fast-food restaurant is often replaced by the inefficiencies associated with long lines of people at the counters or long lines of cars at the drive-through window. Although there are many other irrationalities, the ultimate irrationality is dehumanization. Employees are forced to work in dehumanizing jobs and customers are forced to eat in dehumanizing settings and circumstances. The fast-food restaurant is a source of degradation for employees and customers alike.

McDonaldization, Expansionism, and Globalization McDonald's has been a resounding success in the international arena. About half of McDonald's restaurants are outside the United States (in the mid-1980s only 25 percent of McDonalds were outside the United States). The vast majority of new restaurants opened each year are overseas. Well over half of McDonald's profits come from its overseas operations. Starbucks has become an increasingly global force and is now a presence in Latin America, Europe (it's particularly visible in London), the Middle East, and the Pacific Rim.

Many highly McDonaldized firms outside of the fast-food industry have also had success globally. In addition to its thousands of stores in the United States, Blockbuster now has just over 2,000 sites in 28 other countries. Although Wal-Mart opened its first international store (in Mexico) in 1991, it now operates over a thousand stores overseas (compared to over 3,000 in the United States, including supercenters and Sam's Club).

Another indicator of globalization is the fact that other nations have developed their own variants of this American institution. Canada has a chain of coffee shops, Tim Hortons (merged with Wendy's a few years ago), that has 2,200 outlets (160 in the United States). Paris, whose love for fine cuisine might lead you to think it would prove immune to fast food, has a large number of fast-food *croissanteries*; the revered French bread has also been

control Domination of technologies over employees and customers; a dimension of McDonaldization.

irrationality of rationality The paradoxical reality that rationality seems often to lead to its exact opposite—irrationality.

George Ritzer (1940–)

An Autobiographical Vignette

As with a surprising number of other twists and turns in my academic career, I did not set out to write about globalization. When I first wrote about the McDonaldization of society in 1983, and even a decade later when I published the first edition of a book with that title, I was not fully conscious of its relationship to globalization. I was certainly aware of, and described, the spread of McDonald's, and the larger process that it spawned, through both the United States and the world, but the broader issue of globalization was not on my radar and, in fact, was not much on sociology's radar when I first began this work.

My sensitivity to the relationship between McDonaldization and globalization increased in a 1995 book, *Expressing America: A Critique of the Global Credit Card Society*. As the title makes clear, that book took a global orientation and it included a discussion of McDonaldization focusing on the degree to which the credit card industry was McDonaldized. Perhaps, more importantly for my developing orientation, it focused on credit cards as a form of Americanization and the latter was clearly one aspect of a broad process of globalization.

I soon found myself with three interrelated concepts—McDonaldization, Americanization, and globalization—that needed to be sorted out and analyzed on their own and in relationship to one another. It became clear that both McDonaldization and Americanization were subprocesses under the broader heading of globalization. It also became clear that the former needed to be differentiated with McDonaldization not being reducible to one form of Americanization. For one thing, McDonaldization had roots outside the United States and, more importantly, today it has taken root outside the United States and is being exported back into it.

Gradually, my focus has shifted more and more in the direction of globalization. In my most recent work on the topic, I have come to focus on the globalization of "nothing" and to argue that McDonaldization and Americanization are two key contributors to the globalization of nothing. I have also related that form of globalization to several others in an effort to cast light on globalization in general, especially as it relates to culture.

Thus, I embarked on an intellectual voyage that has led me to a focal interest in globalization, although that topic could not have been further from my mind when I began.

McDonaldized. India has a chain of fast-food restaurants, Nirula's, that sells mutton burgers (about 80 percent of Indians are Hindus, who eat no beef) as well as local Indian cuisine. Mos Burger is a Japanese chain with over 1,500 restaurants that, in addition to the usual fare, sells Teriyaki chicken burgers, rice burgers, and Oshiruko with brown rice cake. Russkoye Bistro, a Russian chain, sells traditional Russian fare like pirogi (meat and vegetable pies), blini (thin pancakes), Cossack apricot curd tart, and, of course, vodka. Perhaps the most unlikely spot for an indigenous fast-food restaurant, war-ravaged Beirut of 1984, witnessed the opening of Juicy Burger, with a rainbow instead of golden arches and the J.B. the Clown standing in for Ronald McDonald.

Its owners hoped that it would become the McDonald's of the Arab world. After the 2003 war with Iraq, a number of clones of McDonald's ("Madonal," "Matbax") quickly opened.

Now McDonaldization is coming full circle. Other countries with their own McDonaldized institutions have begun to export them to the United States. The Body Shop, an ecologically sensitive British cosmetics chain, had over 1,900 shops in 50 nations in 2003, of which 300 were in the United States. Furthermore, American firms are now opening copies of this British chain, such as Bath & Body Works. Pollo Campero, a Guatemalan chain specializing in fried chicken, is currently in six countries and is spreading rapidly throughout the United States.

McDonald's, as the model of the process of McDonaldization, has come to occupy a central position throughout the world. At the opening of McDonald's in Moscow, it was described as the ultimate American icon. When Pizza Hut opened in Moscow in 1990, customers saw it as a small piece of America. Reflecting on the growth of fast-food restaurants in Brazil, an executive associated with Pizza Hut of Brazil said that his nation is passionate about things American.

The "Globalization of Nothing" The globalization of nothing, like McDonaldization, implies increasing homogenization as more and more nations around the world have an increasing number of the various forms of nothing. I am *not* arguing that globalization is nothing; indeed it is clear that the process is of enormous significance. Rather, the argument is that there is an *elective affinity* (using a term borrowed from Weber) between globalization and nothing. That is, one does not cause the other, but they do tend to vary together.

What is central here is the idea of **globalization** (a companion to the notion of globalization, see below for a definition), or the imperialistic ambitions of nations, corporations, organizations, and the like and their desire, indeed need, to impose themselves on various geographic areas. Their main interest is in seeing their power, influence, and in some cases profits *grow* (hence the term *globalization*) throughout the world. Globalization involves a variety of subprocesses, three of which—capitalism, Americanization, McDonaldization—are not only central driving forces in globalization, but also of great significance in the worldwide spread of nothingness.

By **nothing**, I mean (largely) empty forms; forms largely devoid of distinctive content. Conversely, **something** would be defined as (largely) full forms; forms rich in distinctive content. Thus, it is easier to export empty forms throughout the globe than it is forms that are loaded with content (something).

globalization The imperialistic ambitions of nations, corporations, organizations, and the like and their desire, indeed need, to impose themselves on various geographic areas.

nothing Largely empty forms; forms devoid of most distinctive content.

something Largely full forms; forms rich in distinctive content.

The latter are more likely to be rejected by at least some cultures and societies because the content conflicts, is at variance with, local content. In contrast, since they are largely devoid of distinctive content, empty forms are less likely to come into conflict with the local. In addition, empty forms have other advantages from the point of view of globalization including the fact that since they are so minimalist, they are easy to replicate over and over. They also have a cost advantage since they are relatively inexpensive to reproduce. A good example of nothing in these terms is the shopping mall (e.g., any of the malls created by the Mills Corporation—Potomac Mills, Sawgrass Mills, etc.), which is an empty (largely) structure that is easily replicated around the world. These malls could be filled with an endless array of specific content (e.g., local shops, local foods, etc.—something!) that could vary enormously from one locale to another. However, increasingly they are filled with chain stores of various types—nothing! Since more and more countries in the world have these malls, this is an example of the grobalization of nothing and of increasing global homogenization.

There are four subtypes of nothing and all of them are largely empty of distinctive content and are being globalized. The four types are “non-places,” or settings that are largely empty of content (e.g., the malls discussed above); “non-things” such as credit cards in which there is little to distinguish one from the billions of others and which work in exactly the same way for all who use them anywhere in the world; “non-people,” or the kind of employees associated with non-places, for example, telemarketers (who may be virtually anywhere in the world) and who interact with all customers in much the same way, relying heavily on scripts; and “non-services” such as those provided by ATMs (the services provided are identical; the customer does all the work involved in obtaining the services) as opposed to human bank tellers. The grobal proliferation of non-places, non-things, non-people, and non-services is another indication of increasing homogenization.

Cultural Hybridization

The third paradigm emphasizes the mixing of cultures as a result of globalization and the production, out of the integration of the global and the local, of new and unique hybrid cultures that are not reducible to either the local or the global culture. From this perspective, McDonaldization and the grobalization of nothing may be taking place, but they are largely superficial changes. Much more important is the integration of these and other global processes with various local realities to produce new and distinctive hybrid forms that indicate continued heterogenization rather than homogenization. Hybridization is a very positive, even romantic, view of globalization as a profoundly creative process out of which emerges new cultural realities, and continuing if not increasing heterogeneity, in many different locales.

The concept that gets to the heart of cultural hybridization, as well as what many contemporary theorists interested in globalization think about the nature

of transnational processes, is glocalization. **Glocalization** can be defined as the interpenetration of the global and the local resulting in unique outcomes in different geographic areas. While grobalization, as discussed above, tends to be associated with the proliferation of nothing, glocalization tends to be tied more to something and therefore stands opposed, at least partially (and along with the local itself), to the spread of nothing.

Following Roland Robertson, the following are the essential elements of glocalization:

1. The world is growing more pluralistic. Glocalization theory is exceptionally sensitive to differences within and between areas of the world.
2. Individuals and local groups have great power to adapt, innovate, and maneuver within a glocalized world. Glocalization theory sees local individuals and groups as important and creative agents.
3. Social processes are relational and contingent. Globalization provokes a variety of reactions—ranging from nationalist entrenchment to cosmopolitan embrace—that feed back on and transform grobalization; that produce glocalization.
4. Commodities and the media are *not* seen as (totally) coercive, but rather as providing material to be used in individual and group creation throughout the glocalized areas of the world.

Those who emphasize glocalization tend to see it as militating against the grobalization of nothing and, in fact, view it as leading to the creation of a wide array of new, “glocal” forms of something. In contrast, those who emphasize grobalization see it as a powerful contributor to the spread of nothingness throughout the world.

A discussion of some closely related terms (and related examples) will be of considerable help in getting a better sense of glocalization, as well as the broader issue of cultural hybridization. Of course, **hybridization** itself is one such term emphasizing increasing diversity associated with the unique mixtures of the global and the local as opposed to the *uniformity* associated with grobalization. A cultural hybrid would involve the combination of two, or more, elements from different cultures and/or parts of the world. Among the examples of hybridization (and heterogenization, glocalization) are Ugandan tourists visiting Amsterdam to watch two Moroccan women engage in Thai boxing, Argentinians watching Asian rap performed by a South American band at a London club owned by a Saudi Arabian, and the more mundane experiences of Americans eating such concoctions as Irish bagels, Chinese

glocalization The interpenetration of the global and the local resulting in unique outcomes in different geographic areas.

hybridization A perspective on globalization that emphasizes the increasing diversity associated with unique mixtures of the global and the local as opposed to the *uniformity* associated with grobalization.

tacos, Kosher pizza, and so on. Obviously, the list of such hybrids is long and growing rapidly with increasing hybridization. The contrast of course would be such uniform experiences as eating hamburgers in the United States, quiche in France, or sushi in Japan.

Yet another concept that is closely related to glocalization is **creolization**. The term *creole* generally refers to people of mixed race, but it has been extended to the idea of the creolization of language and culture involving a combination of languages and cultures that were previously unintelligible to one another.

All of the above—glocalization, hybridization, creolization—should give the reader a good feel for what is being discussed here under the heading of cultural hybridization.

Appadurai's "Landscapes" Arjun Appadurai's *Modernity at Large: Cultural Dimensions of Globalization* emphasizes global flows and the disjunctures among them. These serve to produce unique cultural realities around the world; they tend to produce cultural hybrids.

Appadurai discusses five global flows—*ethnoscapes*, *mediascapes*, *technoscapes*, *financescapes*, and *ideoscapes*. The use of the suffix *scape* allows Appadurai to communicate the idea that these processes have fluid, irregular, and variable shapes and are therefore consistent with the idea of heterogenization and not homogenization. That there are a number of these scapes and that they operate independently of one another to some degree, and are perhaps even in conflict with one another, make this perspective also in tune with those that emphasize cultural diversity and heterogeneity. Furthermore, these scapes are interpreted differently by different agents ranging all the way from individuals, to face-to-face groups, subnational groups, multinational corporations, and even nation-states. And these scapes are ultimately navigated by individuals and groups on the basis of their own subjective interpretations of them. In other words, these are imagined worlds and those doing the imagining can range from those who control them to those who live in and traverse them. While power obviously lies with those in control and their imaginings, this perspective gives to those who merely live in or pass through them the power to redefine and ultimately subvert them.

At the center of Appadurai's thinking are the five landscapes mentioned above:

1. **Ethnoscapes** are the mobile, moving groups and individuals (tourists, refugees, guest workers) that play such an important role in the shifting world in which we increasingly live. This involves actual movement as well as fantasies about moving. Furthermore, in an ever-changing world, people

creolization A combination of cultures that were previously separate from one another; often used interchangeably with hybridization.

ethnoscapes Mobile groups and individuals (tourists, refugees, guest workers). Can involve actual movement as well as fantasies about moving; one of Appadurai's landscapes.

cannot afford to allow their imaginations to rest too long and thus must keep such fantasies alive.

2. **Technoscapes** are the ever-fluid, global configurations of high and low, mechanical and informational technology and the wide range of material (Internet, e-mail) that now moves so freely and quickly around the globe and across borders that were at one time impervious to such movement (or at least thought to be).
3. **Financescapes** involve the processes by which huge sums of money move through nations and around the world at great speed through commodity speculations, currency markets, national stock exchanges, and the like.
4. **Mediascapes** involve both the electronic capability to produce and transmit information around the world as well as the images of the world that these media create and disseminate. Involved here are global film makers and distributors, television stations (CNN and Al-Jazeera are notable examples), and newspapers and magazines.
5. **ideoscapes**, like mediascapes, are sets of images. However, they are largely restricted to political images either produced by states and in line with their ideology, or the images and counter-ideologies produced by movements that seek to supplant those in power, or at least to gain a piece of that power.

Three things are especially worth noting about Appadurai's landscapes. First, they can be seen as global processes that are partly or wholly independent of any given nation-state. Second, global flows not only occur through the landscapes, but also increasingly in and through the *disjunctures* among them. Thus, to give one example of such a disjuncture, the Japanese are open to ideas (ideoscapes, mediascapes), but notoriously closed to immigration (at least one of the ethnoscapes). More generally, the free movement of some landscapes may be at variance with blockages of others. Studies in this area must be attuned to such disjunctures and to their implications for globalization. Third, territories are going to be affected differently by the five landscapes and their disjunctures leading to important differences among and between cultures. The

technoscapes The ever-fluid, global configurations of high and low, mechanical and informational technology and the wide range of material (Internet, e-mail) that now moves so freely and quickly around the globe and across borders; one of Appadurai's landscapes.

financescapes The processes by which huge sums of money move through nations and around the world at great speed; one of Appadurai's landscapes.

mediascapes The electronic capability to produce and transmit information around the world as well as the images of the world that these media create and disseminate; one of Appadurai's landscapes.

ideoscapes Largely political images either produced by states and in line with their ideology, or the images and counter-ideologies produced by movements that seek to supplant those in power, or at least to gain a piece of that power; one of Appadurai's landscapes.

focus on landscapes and their disjunctures points globalization studies in a set of unique directions. However, it is in line with the idea that globalization is much more associated with heterogenization than homogenization.

ECONOMIC THEORY

While there are many theories of the economic aspects of globalization, the most important perspectives, at least in sociology, tend to be those associated with Marxian theory, that are neo-Marxian in nature. Two major examples are discussed in this section.

Neo-Liberalism

Neo-liberalism is a theory that is particularly applicable to economics (especially the market and trade), as well as politics (especially the need to limit the government's involvement in, and control over, the market and trade). It is not only an important theory in itself, but it has also strongly influenced other thinking and theorizing about both of those domains. This is especially the case with various neo-Marxian economic theories that are highly critical of neo-liberalism. In the following section we will deal with two of the major neo-Marxian alternatives to neo-liberalism.

A number of well-known scholars, especially economists, are associated with neo-liberalism. We will briefly examine some of the ideas of one neo-liberal economist—William Easterly—here in order to give the reader a sense of this perspective from the point of view of one of its supporters.

Easterly is opposed to any form of collectivism and state planning, either as they were espoused and practiced in, for example, the Soviet Union or are today by the UN, other economists, and so on. Collectivism failed in the Soviet Union and, in Easterly's view, it will fail today. It will fail because it inhibits, if not destroys, freedom and freedom, especially economic freedom, is highly correlated with economic success. This is the case because economic freedom allows for searches for success that are decentralized; such searches go the heart of the idea of a free market. Economic freedom and the free market are great favorites of neo-liberal economists.

Easterly offers several reasons why economic freedom is related to economic success. First, it is extremely difficult to know in advance which economic actions will succeed and which will fail. Economic freedom permits a multitude of actions and those that fail are weeded out. Over time, what remains, in the main, are the successful actions and they serve to facilitate a higher standard of living. Central planners can never have nearly as much knowledge as myriad individuals seeking success and learning from their failures and from those of others. Second, markets offer continuous feedback on which actions are succeeding and failing; central planners lack such feedback. Third, economic freedom leads to the ruthless reallocation of resources to those actions that are succeeding; central planners often have vested interests that prevent such a

reallocation. Fourth, economic freedom permits large and rapid increases in scale by financial markets and corporate organizations; central planners lack the flexibility to make large-scale changes rapidly. Finally, because of sophisticated contractual protections, individuals and corporations are willing to take great risks; central planners are risk-averse because of their personal vulnerability if things go wrong.

Created by John Locke (1632–1704), Adam Smith (1723–1790), and others, classical *liberal theory* came to be termed neo-liberalism, at least by some, as a result of developments in the 1930s. The term **neo-liberalism** involves a combination of the political commitment to individual liberty with *neoclassical* economics devoted to the free market and opposed to state intervention in that market. Entrepreneurs are to be liberated, markets and trade are to be free, states are to be supportive of this and to keep interventions to a minimum, and there are to be strong property rights.

Neo-liberalism emerged during the Depression era, at least in part, in reaction to Keynesian economics and its impact on the larger society. The market, entrepreneurs, and corporations, inspired in part by the then-predominant theories of John Maynard Keynes (1883–1946), came to be limited by a number of constraints (social and political) and a strong regulative environment. In addition, calls for a revitalization of liberal ideas were spurred by the need to counter the collectivism (Marxian theory) that dominated much thinking and many political systems in the early 20th century.

The intellectual leaders of this revitalization were economists, especially members of the Austrian School including Friedrich van Hayek (1899–1992) and Ludwig von Mises (1881–1973). An organization devoted to liberal ideas—the Mont Pelerin Society (MPS)—was created in 1947. Its members were alarmed by the expansion of collectivist socialism (especially in, and sponsored by, the Soviet Union) and the aggressive intervention by liberal governments in the market (e.g., Franklin Roosevelt's "New Deal"). Those associated with MPS, especially the famous and highly influential Chicago economist, Milton Friedman (1912–2006), played a key role in the efforts to protect traditional liberal ideas, to develop neo-liberal theory, and to sponsor their utilization by countries throughout the world.

Neo-liberalism as a theory comes in various forms, but all are undergirded by some or all of the following ideas:

- Great faith is placed in the *free market* and its rationality. The market needs to be allowed to operate free of any impediments, especially those imposed by the nation-state and other political entities. The free operation of the market will in the "long run" advantage just about everyone and bring about both improved economic welfare and greater individual freedom (and a democratic political system). To help bring this about, it is important

neo-liberalism A theory that combines the political commitment to individual liberty with *neoclassical* economics devoted to the free market and opposed to state intervention in that market.

to champion, support, and expand a wide range of technological, legal and institutional arrangements that support the market and its freedom. The free market is so important that neo-liberals equate it with capitalism. Further, the principles of the free market are not restricted to the economy (and the polity); transactions in every sphere of life (family, education, culture) *should* also be free like those in the economy.

- The key, if not only, actor in the market is the *individual*; neo-liberalism is radically individualistic.
- Related to the belief in the free market is a parallel belief in *free trade*.
- Where there are restraints on the free market and free trade, the theory leads to a commitment to *deregulation* to limit or eliminate such restraints. Free markets and free trade are linked to a *democratic political system*. Thus the political system, especially the freedom of democracy, is associated with economic well-being and with the freedom of individuals to amass great individual wealth.
- There is a commitment to *low taxes* and to *tax cuts* (especially for the wealthy) where taxes are deemed too high and too burdensome. Low taxes and tax cuts are believed to stimulate the economy by encouraging people to earn more and ultimately to invest and to spend more.
- *Tax cuts for business and industry* are also encouraged with the idea that they would use the tax savings to invest more in their operations and infrastructure, thereby generating more business, income and profits. This is seen as benefiting not only business and industry, but society as whole. Higher profits would “trickle down” and benefit most people in society.
- Spending on *welfare should be minimized* and the *safety net* for the poor should be *greatly reduced*. Such spending and such a welfare system are seen as hurting economic growth and even as harming the poor. Cuts in welfare are designed to reduce government expenditures and thereby to allow the government to cut taxes and/or to invest in more “productive” undertakings. It also is presumed that without the safety net more poor people would be forced to find work, often at minimum wage or with low pay. More such workers presumably allow companies to increase productivity and profits. Reduction of the safety net also creates a larger “reserve army” that business can draw on in good economic times in order to expand its workforce.
- There is a strong and generalized belief in *limited government*. The theory is that no government or government agency can do things as well as the market (the failure of the Soviet Union is seen as proof of that). Among other things, this leaves a government that is, at least theoretically, less able, or unable, to intervene in the market. It also presumably means a less expensive government, one that would need to collect less in taxes. This, in turn, would put more money in the hands of the public, especially the wealthier members of society who, in recent years, have benefited most from tax cuts. The state must not only be limited, but its job is to cooperate with open global markets.

- There is great belief in the need for the *global capitalist system to continue to expand*. It is presumed that such expansion would bring with it increased prosperity (but for which members of society?) and decreased poverty.

While most of the above deals with the neo-liberal economy, a few ideas apply to the closely linked neo-liberal state. More concretely and directly, the neo-liberal state should:

- Provide a climate that is supportive of business and its ability to accumulate capital. This should be done even if certain actions (e.g., raising interest rates by the Federal Reserve) lead to higher unemployment for the larger population.
- Focus on furthering, facilitating and stimulating (where necessary) the interests of business. This is done in the belief that business success will benefit everyone. However, many believe that neo-liberalism has benefited comparatively few people and areas of the world.
- Privatize sectors formerly run by it (e.g., education, telecommunications, transportation) in order to open up these areas for business and profit-making. It seeks to be sure that those sectors that cannot be privatized are “cost effective” and “accountable.”
- Work to allow the free movement of capital among and between economic sectors and geographic regions.
- Extol the virtues of free competition, although it is widely believed that the state actually works in support of the monopolization of markets by business interests.
- Work against groups (e.g., unions, social movements) that operate to restrain business interests and their efforts to accumulate capital.
- Work to reduce barriers to the free movement of capital across national borders and to the creation of new markets.
- Bail out financial institutions if they are in danger of collapse (as in the 2007–8 cases of Bear Stearns, Fannie Mae and Freddie Mac, AIG, Citibank).

Overall, critics argue that the neo-liberal state favors elites, but seeks to conceal that fact by seeming to be democratic; in fact, it is in the eyes of many deeply antidemocratic. Its emphasis on things like freedom and liberty is largely restricted to the market.

Contrary to the established view, neo-liberalism has not made the state irrelevant. Rather, the institutions and practices of the state have been transformed to better attune them to the needs and interests of the neo-liberal market and economy.

However, the neo-liberal state is riddled with internal contradictions. For one thing, its authoritarianism co-exists uncomfortably with its supposed interest in individual freedom and democracy. For another, while it is committed to stability, its operations, especially in support of financial (and other) speculation, lead to increased instability. Then there is commitment to competition while it operates on behalf of monopolization. Most generally, there is the contradiction that its public support for the well-being of everyone is given the lie by its actions in support of the economic elites.

Critiquing Neo-Liberalism

The Early Thinking of Karl Polanyi Much of the contemporary critique of neo-liberalism, especially as it relates to economics, is traceable to the work of Karl Polanyi (1886–1964), especially his 1944 book, *The Great Transformation: The Political and Economic Origins of Our Time*. He is the great critic of a limited focus on the economy, especially the focus of economic liberalism on the self-regulating, or unregulated, market, as well as on basing all on self-interest. In his view, these are not universal principles, but rather were unprecedented developments associated with the advent of capitalism. Polanyi shows that the *laissez-faire* system came into existence with the help of the state and it was able to continue to function as a result of state actions. Furthermore, if the *laissez-faire* system was left to itself, it threatened to destroy society. Indeed, it was such threats, as well as real dangers, that led to counter-reactions by society and the state (e.g., socialism, communism, the New Deal) to protect themselves from the problems of a free market, especially protection of the products of, and those who labored in, it. The expansion of the *laissez-faire* market and self-protective reaction against it by the state and society is called the **double movement**. While economic liberalism saw such counter-reactions (including any form of protectionism) as “mistakes” that disrupted the operation of the economic markets, Polanyi saw them as necessary and desirable reactions to the evils of the free market. Polanyi saw the self-regulating market as an absurd idea. He also described as mythical the liberal idea that socialists, communists, New Dealers, and so on were involved in a conspiracy against liberalism and the free market. Rather than being a conspiracy, what took place was a natural, a “spontaneous,” collective reaction by society and its various elements that were threatened by the free market. In his time, Polanyi saw a reversal of the tendency for the economic system to dominate society. This promised to end the evils produced by the dominance of the free market system, and also to produce *more*, rather than less, freedom. That is, Polanyi believed that collective planning and control would produce more freedom, more freedom for all, than was then available in the liberal economic system.

It is interesting to look back on Polanyi’s ideas with the passage of more than sixty years since their publication and especially with the rise of a global economy dominated by the kind of free market system he so feared and despised. Polanyi’s hope lay with society and the nation-state, but these have been rendered far less powerful with the rise of globalization, especially the global economy. Very telling here is Margaret Thatcher’s (in)famous statement: “There is no such thing as society.” Without powerful social and political influences, one wonders where collective planning and social control over the market are to come from. Clearly, such planning and control are more inadequate than ever in the global age. Beyond that, one wonders whether the creation of truly global

double movement The expansion of the *laissez-faire* market and the self-protective reaction against it by the state and society.

planning and control is either possible or desirable. Nevertheless, it is likely that were he alive today, the logic of Polanyi’s position would lead him to favor global planning and control because of his great fears of a free market economy, now far more powerful and dangerous because it exists on a global scale.

The great global economic crisis of 2007–2009 underscores the importance of Polanyi’s ideas. The market had come to be allowed unprecedented freedom; restraints on it turned out to be limited or nonexistent. The result was a series of excesses (mortgage loans to those who should not have qualified for them; excessively risky undertakings by financial institutions; financial instruments that were opaque [e.g., “derivatives”] and that diffused responsibility for bad loans [mortgage-backed securities], etc.) that led to the collapse of the American housing market, the credit crunch and eventually a global economic meltdown. Polanyi would have said that the cause of all of this was a lack of state control over the market. In fact, in wake of the crisis we are witnessing a resurfacing of interest in regulating the market and the economy.

(More) Contemporary Criticisms of Neo-Liberalism. Among the problems with neo-liberalism as a theory is the fact that it assumes that everyone in the world wants very narrow and specific types of economic well-being (to be well-off economically, if not rich) and political freedom (democracy). The fact is, there are great cultural differences in the ways in which well-being (e.g., to not have to work very hard) and freedom (e.g., to be unfettered by the state even if it is not democratically chosen) are defined. Neo-liberalism very often comes down to the North, the United States, and/or global organizations (e.g., International Monetary Fund), seeking to impose *their* definitions of well-being and freedom on other parts of the world. Furthermore, there is great variation on this among individuals in each of these societies with the result that these definitions are different from at least some of theirs, but are nonetheless imposed on them.

Another problem lies in the fact that the theory conceals or obscures the social and material interests of those who push such an economic system with its associated technological, legal, and institutional systems. These are *not* being pursued because everyone in the world wants them or will benefit from them, but because *some*, usually in the North, are greatly advantaged by them and therefore push them.

Among the other criticisms of neo-liberalism are the fact that it has produced financial crises in various countries throughout the world (e.g., Mexico, Argentina), its economic record has been dismal since it has redistributed wealth (from poor to rich) rather than generating new wealth, it has sought to commodify *everything*, it has helped to degrade the environment, and so on. Furthermore, there are signs that it is failing such as deficit financing in the United States and China, signs of more immediate crisis (e.g., burgeoning budget deficits, the bailout of financial institutions), and evidence that U.S. global hegemony is crumbling.

The Death of Neo-Liberalism? It is arguable that the economic crisis of 2007–9 spelled the beginning of the end of neo-liberalism (see box). In a speech in late 2008 French President Sarkozy said: “The idea of the absolute power of the

Contemporary Application Is Global Neo-Liberal Capitalism Dead?

The deep economic recession that began in the United States in late 2007 deepened in the ensuing months and years and spread rapidly throughout much of the world threatening globalization, in particular neo-liberal economic globalization. There have been prior epochs of globalization (e.g., the late 1800s until 1914) and they were ended by abrupt changes such as war (e.g., World War I) and a recession/depression. A frequent reaction in such times is for nations to begin to close their borders and to turn inward, especially economically; to engage in "protectionism." The goal is to husband remaining resources and protect the nation as much as possible from the disastrous effects of negative global flows of all types (e.g., military invasion, a run on stock markets and banks). However, such protectionism is anathema to capitalism in general, but especially neo-liberal global capitalism, which is premised on free markets and free trade. The partially or completely closed borders that result from protectionism serve to block, at least in part, the flow of goods, money and the like that is the lifeblood of neo-liberal global capitalism. During the global economic crisis that began in late 2007, the dangers posed by protectionism to global capitalism led to warnings being raised, most notably by the President of the United States (the major source and the center of neo-liberalism and capitalism), that nations should not react to it by resorting to protectionism.

However, a broader issue may have been raised by this most recent global economic crisis and that is the future of global capitalism, especially in its neo-liberal form. The crisis commenced in the United States and began because of the lack of restraints on, and regulations over, capitalist enterprises, especially financial institutions and their highly risky investments. Many institutions throughout the world had bought some of these high-risk investments (not fully understanding how risky they were) and losses cascaded around the world. Losses across the world led to other kinds of losses and a growing lack of confidence in the global economic system led to deep declines in many stock markets, and economies in general, throughout

markets that should not be constrained by any rule, by any political intervention, was a mad idea. The idea that markets are always right was a mad idea.⁴⁴ Referring implicitly to the global economic system dominated to that point by neo-liberalism, Sarkozy argued that "we need to rebuild the whole world financial and monetary system from scratch."⁴⁵ In other words, we need to scuttle the remnants of the global neo-liberal economic system, just as the Keynesian system was scuttled as neo-liberalism gained ascendancy, and replace it with some as yet undefined alternative. Where and how far this goes remains to be seen, but believers in neo-liberalism have not disappeared and their ideas, perhaps in some new form, are likely to resurface when the dust of the current economic crisis settles.

If nothing else, this economic crisis has reminded us of the importance of not only the neo-Marxian critique of neo-liberalism, but also of neo-Marxian alternatives to it. We turn now to two major examples of neo-Marxian thinking.

Contemporary Applications—Continued

the world. Job losses accelerated, poverty increased, and fear and worry over the economy mounted. Many, including the President of France, Nicolas Sarkozy, blamed American-style, risk-taking, neo-liberal capitalism and began a search for global alternatives to it.

The issue is: Is there a viable alternative to a neo-liberal global economy? There are, of course, many ways to run an economy (e.g., socialism), including a global economy, but the most likely alternative seems to be some efforts to reform neo-liberalism both in terms of the way it operates in the United States (and elsewhere), as well as globally. Thus, global neo-liberal capitalism does *not* seem to be dead. Rather, what is likely to happen once the immediate crisis passes is a wide range of efforts to reform the system so that its worst inadequacies and abuses are limited or eliminated. What this will mean is the creation of a variety of regulations and restraints on capitalism and its enterprises both nationally and globally. After all, many blamed the crash that began in December, 2007 on the relaxation, or inadequacy of, restraints on the system, especially in the United States.

So, we will see an era of "restrained" neo-liberal global capitalism. At a general level, neo-liberalism regards any form of restraint as anathema to its basic principles. More concretely, if history is any guide, capitalistic businesses will find those restraints objectionable and in their pursuit of ever-higher profits will seek, and eventually find, ways to circumvent them. Without constant vigilance, the world will find itself faced with a renewal of economic excess and the possibility of yet another global economic meltdown in the not-too-distant future. From the point of view of Marxian and neo-Marxian theory, this is just another example of the "boom and bust" character of capitalism. The big question is whether the great gains in boom periods (which tend to go to a relatively small portion of the population) are worth the disastrous consequences of the busts (especially for those least able to afford an economic setback). If not, then an alternative to neo-liberal global capitalism is needed.

Neo-Marxian Theoretical Alternatives to Neo-Liberalism

We have already presented, at least implicitly, critiques of neoliberalism from a neo-Marxian perspective, but neo-Marxists have done more than critique neo-liberalism, they have developed their own perspectives on, and theories of, capitalism. While neoliberalism is supportive of capitalism, the neo-Marxists are, needless to say, critical of it. In this section we offer two examples of a neo-Marxian approach that are explicitly and implicitly critical of the neo-liberal theory outlined in this chapter. However, they are not only of interest as critiques; they are important in their own right.

Transnational Capitalism

Leslie Sklair distinguishes between two systems of globalization. The first—the capitalist system of globalization—is the one that is now predominant. The

other is the socialist system that is not yet in existence, but is foreshadowed by current antiglobalization movements, especially those oriented toward greater human rights throughout the world. The antiglobalization movements, and the possibility of a socialist form, are made possible by the problems in the current system of globalization, especially class polarization and the increasing ecological unsustainability of capitalist globalization.

While the nation-state remains important, it is the case that Sklair focuses on transnational practices that are able to cut across boundaries—including those created by states—with the implication that territorial boundaries are of declining importance in capitalist globalization. As a Marxist, Sklair accords priority to economic transnational practices and it is in this context that one of the central aspects of his analysis—**transnational corporations**—predominate. Underlying this is the idea that capitalism has moved away from being an international system (since the nation [-state] is of declining significance) to a globalizing system that is decoupled from any specific geographic territory or state.

The second transnational practice of great importance is political and here the **transnational capitalist class** predominates. However, it is not made up of capitalists in the traditional Marxian sense of the term. That is, they do not necessarily own the means of production. Sklair differentiates among four “fractions” of the transnational capitalist class. The first is the *corporate fraction* made up of executives of transnational corporations and their local affiliates. Second, there is a *state fraction* composed of globalizing state and interstate bureaucrats and politicians. The third, *technical fraction*, is made up of globalizing professionals. Finally, there is the *consumerist fraction* encompassing merchants and media executives. This is obviously a very different group than Marx thought of in conceptualizing the capitalist.

The transnational capitalist class may not be capitalist in a traditional sense of the term, but it is transnational in various ways. First, its “members” tend to share global (as well as local) interests. Second, they seek to exert various types of control across nations. That is, they exert economic control in the workplace, political control in both domestic and international politics, and culture-ideological control in everyday life across international borders. Third, they tend to share a global rather than a local perspective on a wide range of issues. Fourth, they come from many different countries, but increasingly they see themselves as citizens of the world and not just of their place of birth. Finally,

transnational corporations Corporations that dominate the contemporary capitalist global economy and whose actions are largely unconstrained by the borders of nation-states.

transnational capitalist class Not made up of capitalists in the traditional Marxian sense of the term; its members do not necessarily own the means of production. Includes four “fractions”—*corporate*, made up of executives of transnational corporations and their local affiliates; *state*, composed of globalizing state and interstate bureaucrats and politicians; *technical*, made up of globalizing professionals; *consumerist*, encompassing merchants and media executives.

wherever they may be at any given time, they share similar lifestyles, especially in terms of the goods and services they consume.

The third transnational practice is culture-ideology and here Sklair accords great importance to the **culture-ideology of consumerism** in capitalist globalization. While the focus is on culture and ideology, this ultimately involves the economy by adding an interest in consumption to the traditional concern with production (and the transnational corporations) in economic approaches in general, and Marxian theories in particular. It is in this realm that the ability to exert ideological control over people scattered widely throughout the globe has increased dramatically primarily through the greater reach and sophistication of advertising, the media, and the bewildering array of consumer goods that are marketed by and through them. Ultimately, they all serve to create a global mood to consume that benefits transnational corporations, as well as the advertising and media corporations that both are examples of such corporations and profit from them.

Ultimately, Sklair is interested in the relationship among the transnational social practices and institutions that dominate each by arguing that transnational corporations utilize the transnational capitalist class to develop and solidify the consumerist culture and ideology that is increasingly necessary to feed the demands of the capitalist system of production. Indeed, it is this relationship that defines global capitalism today and it is the most important force in ongoing changes in the world.

As a Marxist, Sklair is not only interested in critically analyzing capitalist globalization, but in articulating an alternative to it and its abuses. He sees some promising signs in the protectionism of some countries that see themselves as exploited by transnational corporations. Also hopeful are new social movements such as the green movement seeking a more sustainable environment and the various anti-globalization groups that have sprung up in recent years. He is particularly interested in various human rights movements in which, he believes, can be found the seeds of the alternative to capitalist globalization, that is socialist globalization. He predicts that these and other movements will gain momentum in the 21st century as they increasingly resist the ways in which globalization has been appropriated by transnational corporations. In fact, in good Marxian dialectical terms, he sees the success of capitalist globalization sowing the seeds of its own destruction. That is, its expansion tends to provide the opponents with resources (derived from the economic success of transnational capitalism), organizational forms (copied from the successful organizations in global capitalism), and most obviously a clarity of purpose. That is, as the transnational corporations grow more successful, so do their abuses and the need to supplant them as the central players in the global system.

culture-ideology of consumerism An ideology that affects people scattered widely throughout the globe with the greater reach and sophistication of advertising, the media, and consumer goods. Ultimately, a global mood to consume is created that benefits transnational corporations, as well as the advertising and media corporations.

Empire The most important and widely discussed and debated Marxian approach to globalization is Michael Hardt and Antonio Negri's *Empire*. Although they have reservations about postmodern social theory, they analyze the postmodernization of the global economy. They associate modernity with **imperialism**, the defining characteristic of which is a nation(s) at the center that controls and exploits, especially economically, a number of areas throughout the world. In a postmodern move, they "decenter" this process thereby defining empire as a postmodern reality in which such dominance exists, but *without* any single nation (or any other entity) at its center. To put this another way, modern sovereignty can be traced to a *place*, but in its postmodern form as empire sovereignty exists in a nonplace. That is, there is no center, it is deterritorialized, it is virtual in the form of communication (especially through the media), and, as a result, the spectacle of the empire is everywhere; it is omnipresent.

Empire does not yet exist fully; it is in formation at the moment, but we can already get a sense of its parameters. Empire governs the world with a single logic of rule, but there is no single power at the heart of empire. Instead of a single source of command, in empire power is dispersed throughout society and the globe. Even the United States, in spite of its seeming hegemony in the world today, is not an empire in these terms and does not lie at the heart of Hardt and Negri's sense of an empire. However, the sovereignty of the United States does constitute an important precursor to empire and the United States continues to occupy a privileged position in the world today. However, it is in the process of being supplanted by empire.

Empire lacks (or will) geographic or territorial boundaries. It can also be seen as lacking temporal boundaries in the sense that it seeks (albeit unsuccessfully) to suspend history and to exist for all eternity. It also can be seen as lacking a lower boundary in that it seeks to expand down into the depths of the social world. This means that it seeks control not only of the basics of the social world (thought, action, interaction, groups), but to go further in an effort to use biopower to control human nature and population; both peoples' brains and their bodies. In a way, empire is far more ambitious than imperialism in that it seeks to control the entirety of life down to its most basic levels.

The key to the global power of **empire** lies in the fact that it is (or seeks to be) a new juridical power. That is, it is based on such things as the constitution of order, norms, ethical truths, and a common notion of what is right. This

imperialism The control and exploitation, especially economically, of a number of areas throughout the world by a nation(s) at the center.

empire A decentered, postmodern Marxian perspective on globalization and the exertion of power around the world based on new juridical power such as the constitution of order, norms, ethical truths, and a common notion of what is right. It can, in the name of what is "right," intervene anywhere in the world in order to deal with what it considers humanitarian problems, to guarantee accords, and to impose peace on those who may not want it or even see it as peace.

juridical formation is the source of power of empire. Thus, it can, in the name of what is "right," intervene anywhere in the world in order to deal with what it considers humanitarian problems, to guarantee accords, and to impose peace on those who may not want it or even see it as peace. More specifically, it can engage in "just wars" in the name of this juridical formation; the latter legitimates the former. Such wars become a kind of sacred undertaking. The enemy is anyone or anything that the juridical formation sees as a threat to ethical order in the world. Thus, the right to engage in just war is seen as boundless, encompassing the entire space of civilization. The right to engage in it is also seen as boundless in time; it is permanent, eternal. In a just war, ethically grounded military action is legitimate and its goal is to achieve the desired order and peace. Thus, empire is not based on force, but on the ability to project force in the service of that which is right (precursors of this can be seen in the two U.S. wars against Iraq, as well as the incursion into Afghanistan).

Empire is based on a triple imperative. First, it seeks to incorporate all that it can. It appears to be magnanimous and it operates with a liberal facade. However, in the process of inclusion, it creates a smooth world in which differences, resistance, and conflict are eliminated. Second, empire differentiates and affirms differences. While those who are different are celebrated culturally, they are set aside juridically. Third, once the differences are in place, empire seeks to hierarchize and to manage the hierarchy and the differences embedded in it. It is hierarchization and management that are the real powers of empire.

Empire is, then, a postmodern Marxian perspective on globalization and the exertion of power around the world. However, instead of capitalists, or capitalist nations, exerting that power, it is the much more nebulous empire that is in control. If there are no more capitalists in empire, what about the proletariat? To Hardt and Negri, the time of the proletariat is over. But if the proletariat no longer exists to oppose empire, where is the opposition to it to come from? After all, operating from a Marxian perspective, Hardt and Negri must come up with an oppositional force. In fact, they do not disappoint on this score and label that oppositional group the multitude. This is an interesting choice of terms for many reasons. For one thing it is much more general and abstract than the proletariat and also moves us away from a limited focus on the economy. Secondly, it is clear that there are lots of at least potential opponents of the empire; indeed, those in control in the empire constitute only a small minority vis-à-vis the multitude.

The **multitude** is that collection of people throughout the world that sustains empire in various ways, including, but *not* restricted to, its labor (it is the real productive force in empire). Among other ways, it also sustains it by buying into the culture-ideology of consumption and, more importantly, in actually consuming a variety of its offerings. Like capitalism and its relationship to the

multitude A collection of people throughout the world that sustains empire in various ways, including, but not restricted to, its labor (it is the real productive force in empire), but it also has the power, at least potentially, to overthrow empire.

proletariat, empire is a parasite on the multitude and its creativity and productivity. Like Marx's proletariat (which all but disappears in this theory), the multitude is a force for creativity in empire. Also like the proletariat, the multitude is capable of overthrowing empire through the autonomous creation of a counter-empire. The counter-empire, like empire, is, or would be, a global phenomenon created out of, and becoming, global flows and exchanges. Globalization leads to deterritorialization (and the multitude itself is a force in deterritorialization and is deterritorialized) and the latter is a prerequisite to the global liberation of the multitude. That is, with deterritorialization social revolution can, as Marx predicted, occur, perhaps for the first time, on a global level.

Thus, while Hardt and Negri are certainly critics of globalization, whether it be modern capitalist imperialism or postmodern empire, they also see a utopian potential in globalization. Thus, globalization is *not* the problem, but rather the form that it has taken, or takes, in imperialism and empire. That utopian potential has always been there, but in the past it has been smothered by modern sovereign powers through ideological control or military force. Empire now occupies, or soon will, that controlling position, but its need to suppress that potential is counterbalanced by the need of the multitude to manifest and express it. Ultimately, it is in globalization that there exists the potential for universal freedom and equality. Further, globalization prevents us from falling back into the particularism and isolationism that has characterized much of human history. Those processes, of course, would serve to impede the global change sought by the multitude. More positively, as globalization progresses, it serves to push us more and more in the direction of the creation of counter-empire. This focus on the global serves to distinguish Hardt and Negri from other postmodernists and post-Marxists who tend to focus on the local and the problems and potential that exists there. In contrast, in their view, a focus on the local serves to obscure the fact that the sources of both our major problems and our liberation exist at the global level, in empire.

While Hardt and Negri foresee counter-empire, they, like Marx in the case of communism, offer no blueprint for how to get there or what it might look like. Like communism to Marx, counter-empire will arise out of actual practice (*praxis*), especially that of the multitude. Counter-empire must be global, it must be everywhere, and it must be opposed to empire. Counter-empire is made increasingly likely because empire is losing its ability to control the multitude. Thus, it must redouble its efforts (e.g., through police power) and this serves to mobilize the multitude and make counter-empire more likely. As postmodernists, Hardt and Negri reject a focus on the agent of the type found in Marxian theory, specifically the centrality accorded to the proletarian revolutionary agent who is increasingly conscious of exploitation by capitalism. Instead, they focus on such nonagential, collective actions by the multitude as desertion, migration, and nomadism. In accord with their postmodern orientation and the latter's focus on the body, Hardt and Negri urge a new "barbarism" involving new bodily forms of the kind that are now appearing in the realm of gender, sexuality, and esthetic mutations (such as tattooing and body piercing). Such bodies are less likely to submit to external control and more

Contemporary Applications

The Great Global Economic Meltdown of 2008

If there was any lingering doubt about the reality of globalization, it was put to rest by the global economic crisis that began in 2007 and reached a crescendo (at least for the moment) in late 2008. It began as a largely U.S. problem relating specifically to its housing market, bad mortgage loans, and accelerating foreclosures on those unable to keep up with their mortgage payments. What was at first seen as a small and manageable American problem soon grew out of control in the United States and ultimately spread throughout much of the world.

It turned out that many of these bad mortgages had been carved up into little pieces and packaged as financial instruments (they had been "securitized," turned into mortgage-backed securities) that had been sold to many financial institutions not only in the United States but throughout the world. They had bought them because of faith in the U.S. economy, in the safety of mortgage loans (backed by real estate), and ultimately because small pieces of so many mortgages in any given financial instrument seemed to mean that the failure of a few mortgages would have little impact on the instrument as a whole.

However, as the number of bad mortgages increased dramatically, these financial instruments were increasingly threatened and they declined significantly in value. Soon major American financial institutions came under increasing pressure and a number failed (e.g., Lehman Brothers, Indy Mac and Washington Mutual banks), or were bailed out by the U.S. government (Fannie Mae, Freddie Mac, AIG). These developments put at risk financial institutions throughout the world which found themselves holding financial instruments whose value was in freefall.

Prior to this, there had been much talk that the global economy had "decoupled" from, was no longer closely tied, to the American economy. Many areas (EU) and nations (China, India, Brazil) had become so successful economically that it was believed that they could withstand a decline in the U.S. economy by either trading more with each other and/or increasing consumption of their products, as well as those of other successful economies. To many, it seemed that the economic crises that had previously befallen the world (e.g., the Asian financial crisis of the late 1990s) were a thing of the past.

However, it turned out this was not the case and what was an American economic problem rapidly became a global economic problem. Banks and other financial institutions throughout much of the world came under increasing pressure; some failed and others were bailed out by their governments. Many governments also injected large sums of money into their economies to keep them afloat. Some nations failed almost completely (e.g., Iceland) or experienced severe economic problems and in some cases (e.g., Hungary, Pakistan) had to be helped by financial aid from the International Monetary Fund (IMF). Consumption declined globally and, as a result, production declined in response to lower demand. Global oil prices, which had risen to almost \$150 a barrel, declined to almost \$40 a barrel because of reduced demand as global economies slowed. The demand for other commodities (e.g., copper) also fell and their prices also declined precipitously.

These and other aspects of the economic crisis of 2007–8 indicated how tightly intertwined the world had become and how easily economic problems flowed throughout the world. There was little that any given region or nation-state could do to protect itself from these negative economic flows and from globalization more generally. Of course, this cuts both ways and when the global economy improves those improvements, like the problems, will flow throughout much of the world.

likely to create a new life; the basis of counter-empire. Thus, the revolutionary force is not a conscious agent, but new bodily, corporeal forms.

While Hardt and Negri retain a Marxian interest in production, they do recognize a new world of production and work in which immaterial, intellectual, and communicative labor is increasingly central. Thus, control over those engaged in such work—a key element and increasing proportion of multitude—is of increasing importance. However, while they are controlled through global communication and ideology (especially via the media), it is also through communication and ideology that the revolutionary potential of the multitude will be expressed. The key thing about communication is that it flows easily and effectively across the globe. This makes it easier for empire to exert control, to organize production globally, and to make its justification of itself and its actions immanent within that communication. Conversely, of course, it is also the mechanism by which the multitude can ultimately create counter-empire.

POLITICAL THEORY

There are several theories, most of which are deeply rooted in political science rather than sociology that deal with globalization. **International relations (IR)** focuses on the relations among and between the nation-states of the world. They are viewed as distinct actors in the world, occupying well-defined territories, and as sovereign within their own borders. There is also an emphasis on a distinct and well-defined inter-state system.

Within IR, **political realism** begins with the premise that international politics is based on power, organized violence and ultimately war. It assumes that nation-states are the predominant actors on the global stage; that they act as coherent units in the global arena; that force is not only a usable, but also an effective, method by which nation-states wield power on the global stage; and that military issues are of utmost importance in world politics.

Complex interdependence sees nation-states relating to one another through multiple channels; formally and informally; through normal channels and so-called “back channels.” Where complex interdependence differs from realism is in the importance accorded to these informal channels where,

international relations (IR) A political theory that focuses on the relations among and between the nation-states of the world.

political realism A political theory that operates on the premise that international politics is based on power, organized violence, and ultimately war.

complex interdependence A political theory that sees nation-states relating to one another through multiple channels and that emphasizes informal channels where, for example, entities (e.g., MNCs) other than the state connect societies to one another.

for example, entities (e.g., MNCs) other than the state connect societies to one another. There is no clear hierarchy of interstate relationships and it is certainly not the case that military issues always, or even often, predominate. Coalitions arise within and between nation-states on these issues. Conflict may or may not arise and, if conflict arises, it varies greatly in terms of degree of intensity. Complex interdependence tends to lead to the decline in, or even the disappearance of, the use of military force by one nation-state against other(s) within a given region or alliance, although military action may continue to occur outside that region or bloc. While international organizations have only a minor role to play in the realist view of the world, they play an expanded role from the perspective of complex interdependence. Such organizations bring together representatives from various countries, set agendas, serve as catalysts for the formation of coalitions, serve as arenas from which political initiatives arise, and are helpful to weak states in playing a larger role in the international arena. Thus, the complex interdependence perspective continues to focus on relationships among nation-states, but takes a much wider and broader view of the nature of those relationships.

There is also a variety of positions that are at variance with IR and its derivatives and that offer fundamental challenges to it. Among these are a wide range of other scholars associated with IPE (international political economy) that challenge IR. Among other things, they focus more on power and critique the state-centrism of IR, which ignores other entities with political and economic power, especially the corporation.

An over-riding interest in the literature on globalization and politics is the fate of the nation-state in the age of globalization. Many see the nation-state as threatened by various global processes, especially global economic flows. Some go so far as to argue that the state is now a minor player globally in comparison to a huge and growing borderless global economy that nation-states are unable to control. While nation-states once controlled markets, it is now the markets that often control the nation-states.

There is a variety of other factors threatening the autonomy of the nation-state, including flows of information, illegal immigrants, new social movements, terrorists, criminals, drugs, money (including laundered money, and other financial instruments), sex-trafficking, and much else. Many of these flows have been made possible by the development and continual refinement of technologies of all sorts. The nation-state has also been weakened by the growing power of global and transnational organizations (e.g., the EU) that operate largely free of the control of nation-states. Another factor is the growth of global problems (AIDs, TB) that cannot be handled, or handled very well, by a nation-state operating on its own. A more specific historical factor is the end of the Cold War, which had been a powerful force in unifying, or at least holding together, some nation-states. One example is Yugoslavia and its dissolution at the end of the Cold War, but the main one, of course, is the dissolution of the Soviet Union into a number of independent nation-states (Russia, Ukraine, Georgia, etc). Then there are “failed states” (e.g., Somalia) where there is, in

effect, no functioning national government as well as states that are in the process of breaking down. Clearly, failed states, and states that are disintegrating, are in no position to maintain their borders adequately.

One way of summarizing much of this is to say that the nation-state has become increasingly *porous*. While this seems to be supported by a great deal of evidence, the fact is that no nation-state has *ever* been able to control its borders completely. Thus, it is not the porosity of the nation-state that is new, but rather what is new is a dramatic *increase* in that porosity and of the kinds of flows that are capable of passing through national borders.

There are at least some who contest the position taken above. A variety of arguments is made, including that the nation-state continues to be *the* major player on the global stage, that it retains at least some power in the face of globalization, that nation-states vary greatly in their efficacy in the face of globalization, and that the rumors of the demise of the nation state are greatly exaggerated.

There are even scholars who see the role of the state as not only enduring, but even increasing in the world today. There are greater demands being placed on the state because of four major sources of collective insecurity: terrorism, economic globalization leading to problems such as outsourcing and pressures toward downsizing, threats to national identity due to immigration, and the spread of global diseases such as AIDs. Further, the state does not merely respond to these threats; it may actually find it in its interest to exaggerate or even create dangers and thereby make its citizens more insecure. A good example is the United States and British governments' arguments prior to the 2003 war with Iraq that Saddam Hussein had Weapons of Mass Destruction (WMDs) that posed a direct threat to them. The United States even claimed that Iraq could kill millions by using offshore ships to lob canisters containing lethal chemical or biological material into American cities. The collective insecurity created by such outrageous claims helped foster public opinion in favor of invading Iraq and overthrowing Saddam Hussein.

The other side of this argument in support of the nation-state is that global processes of various kinds are just not as powerful as many believe. For example, global business pales in comparison to business *within* many countries, including the United States. For another, some question the porosity of the nation-state by pointing, for example, to the fact that migration to the United States and other countries has *declined* substantially since its heights in the late 19th and early 20th centuries.

A related point is that it would be a mistake simply to see globalization as a threat to, a constraint on, the nation-state; it can also be an *opportunity* for the nation-state. For example, the demands of globalization were used as a basis to make needed changes (at least from a neo-liberal point of view) in Australian society, specifically allowing it to move away from protectionism and in the direction of (neo-)liberalization, to transform state enterprises into private enterprises, and to streamline social welfare. In this, the rhetoric of globalization, especially an exaggeration of it and its effects, was useful to those politicians who were desirous of such changes. In other words, Australian politicians used globalization as an ideology in order to reform Australian society.

OTHER THEORIES

The preceding, of course, only gives the reader a sense of a few of the types of theorizing about globalization and a few examples of each. There are many other well-known theories of globalization (e.g., ones that draw on network theory and complexity theory, or that focus on religion, sport, or the city). However, the preceding gives the reader at least a sense of the most important broad types of theorizing on, and specific theories of, globalization. Of course, the process of globalization continues, is expanding, and is constantly changing. As a result, we can expect the continuing development of theorizing about globalization, including new and innovative approaches to the topic.

Summary

1. Globalization theory emerged as a result of developments and changes in both the world as a whole as well as within academia.
2. Globalization can be analyzed culturally, economically, politically, and institutionally. A concern for homogenization/heterogenization cuts across work in all of these areas.
3. Central to the work of Giddens on globalization is losing control over the juggernaut of modernity and creating a runaway world.
4. Beck sees hope in globality with the decline of the nation-state and in transnational organizations and possibly a transnational state.
5. To Bauman, what defines the global world is a "space war" between those who have and those who do not have mobility. However, even those with mobility face grave problems.
6. Cultural theories of globalization may be divided into three paradigms—cultural differentialism, cultural convergence, and cultural hybridization.
7. Cultural differentialism adopts the view that there are lasting differences among and between cultures that are largely unaffected by globalization.
8. Huntington offers the best-known example of cultural differentialism with his focus on civilizations, the major civilizations of the world, and the likelihood of economic conflict between Sinic and Western civilization and warfare between Islamic and Western civilization.
9. Cultural convergence takes the view that globalization is leading to increasing sameness around the world.
10. Two examples of cultural convergence are the McDonaldization thesis and the idea that the world is increasingly dominated by the "globalization" of "nothing".
11. Cultural hybridization adopts the perspective that globalization is bringing with it the mixing of cultures; the production of new and unique cultures that are not reducible to either global or local.
12. A number of theoretical ideas are associated with cultural hybridization including glocalization, hybridization, and creolization.
13. A major theory included under the heading of cultural hybridization is Appadurai's thinking on landscapes and the disjunctures among and between them.
14. Neo-liberalism is the dominant economic theory of globalization. It combines a commitment to individual liberty with the economic ideas of the free market and an opposition to state intervention in that market.
15. The excesses of neo-liberalism in the economy and the polity led to counter-reactions to it, including the work of Karl Polanyi on the "double movement," which

involves the expansion of the laissez-faire market and the self-protective reaction against it by the state and society.

16. Leslie Sklair develops a neo-Marxian economic theory of globalization that focuses on transnational capitalism, especially transnational corporations, the transnational capitalist class, and the culture-ideology of consumerism.
17. Sklair argues that transnational capitalism is providing the basis for the emergence of socialist globalization.
18. To Hardt and Negri, we are in the midst of a transition from capitalist imperialism to the dominance of empire. Empire lacks a center and is based on juridical power.
19. The multitude sustains empire, but it also has, at least potentially, the power to overthrow empire and create counter-empire.
20. There are several political theories that relate to globalization, including international relations, political realism, and complex interdependence.
21. A central issue in the study of political globalization is the degree to which the nation-state is being weakened by globalization.

Suggested Readings

- ANTHONY GIDDENS *Runaway World: How Globalization Is Reshaping Our Lives*. New York: Routledge, 2000. Perhaps today's most famous and influential contemporary theorist relates his ideas on the juggernaut of modernity to the possibility that globalization is bringing with it a runaway world.
- ARJUN APPADURAI *Modernity at Large: Cultural Dimensions of Globalization*. Minneapolis: University of Minnesota Press, 1996. An important anthropological take on globalization that is best known for its discussion of various "scapes" and the disjunctures among and between them.
- BENJAMIN BARBER *Jihad vs. McWorld*. New York: Times Books, 1995. Popular and influential work by a political scientist that sees a global split between the forces of McWorld and Jihad. However, it is likely that in order to succeed in the long term, Jihad will need to use more of the tools of McWorld (e.g., Internet, television).
- GEORGE RITZER *The Globalization of Nothing 2*. Thousand Oaks, CA: Pine Forge Press, 2007. A theory of globalization that emphasizes both heterogenization (glocalization) and homogenization (grobalization), although its most important argument is that increasing homogenization is occurring through the grobalization of nothing.
- GEORGE RITZER *The McDonaldization of Society 5*. Thousand Oaks, CA: Pine Forge Press, 2008. Develops both a theory of contemporary society building on Max Weber's theory of rationalization and a theory of increasing global homogenization as a result of the worldwide proliferation of McDonaldized forms.
- GEORGE RITZER *Globalization: A Basic Text*. Malden, MA: Blackwell, 2010.
- JAMES N. ROSENAU *Distant Proximities: Dynamics Beyond Globalization*. Princeton: Princeton University Press, 2003. A political scientist analyzes global political trends through a variety of developments that produce both "distant proximities" and increasing "fragnegration."
- JAN NEDERVEEN PIETERSE *Globalization and Culture: Global Melange*. Lanham, MD: Rowman and Littlefield, 2004. Develops a useful way of looking at three paradigms in the analysis of the relationship between culture and globalization, as well as further developing the idea of hybridization.

- JOHN TOMLINSON *Globalization and Culture*. Chicago: University of Chicago Press, 1999. Excellent overview of work on the relationship between culture and globalization, especially that which emphasizes heterogenization.
- JOHN URRY *Global Complexity*. Cambridge: Polity, 2003. Unique look at globalization through the lens of complexity or chaos theory.
- JOSEPH E. STIGLITZ *Globalization and Its Discontents*. New York: W.W. Norton, 2002. Important critique of globalization and the role played by the United States and key international organizations (e.g., IMF) in structuring globalization to the advantage of the United States and the West.
- LESLIE SKLAIR *Globalization: Capitalism and Its Alternatives*. Oxford: Oxford University Press, 2002. A neo-Marxian economic treatise that emphasizes the importance of transnational corporations, the transnational corporate class, and the culture ideology of consumerism.
- MANUEL CASTELLS *The Rise of the Network Society*. Malden, MA: Blackwell, 1996. Highly processual view of globalization that focuses on global flows and networks.
- MICHAEL HARDT and ANTONIO NEGRI *Empire*. Cambridge: Harvard University Press, 2000. Highly influential and controversial neo-Marxian approach to globalization that sees a more nebulous empire replacing capitalist imperialism and multitude taking the role of the proletariat in traditional Marxian theory.
- MICHAEL HARDT and ANTONIO NEGRI *Multitude: War and Democracy in the Age of Empire*. New York: Penguin, 2004. Important, more popularly oriented, follow-up to *Empire* that among other things further develops the elusive idea of multitude.
- SAMUEL P. HUNTINGTON *The Clash of Civilizations and the Remaking of World Order*. New York: Simon and Schuster, 1996. Perhaps the most controversial book on globalization. It focuses on culture "writ large," that is, civilizations, but its arguments on Islam led to the most heated critiques.
- ULRICH BECK *World Risk Society*. Cambridge: Polity Press, 1999. Beck develops further his theory of risk society, its relationship to globalization, as well as offering further insights into the latter.
- ZYGMUNT BAUMAN *Globalization: The Human Consequences*. New York: Columbia University Press, 1998. One of the most famous theorists of the day expounds on his thoughts on globalization, especially on the "space war" and the advantages that accrue to those who can move easily across space over the immobile.

Endnotes

- ¹Barber's view of McWorld is not restricted to politics; he sees many other domains following the model of McWorld.
- ²For more on this, see Samuel Huntington, "The Hispanic Challenge," *Foreign Policy* March/April 2004.
- ³However, this clearly pales in comparison to the history of Western conquest.
- ⁴www.france24.com/en/20080926.
- ⁵www.france24.com/en/20080926.