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The Globalisation Process and Changing Social Question

Ewa BOGALSKA-MARTIN and Emmanuel MATTEUDI

In "The Social Question in the Global World"

-The Quest for an Effective Paradigm-

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In the age of an unprecedented surge in globalisation, there have been changes in how the social question is addressed in developed and developing countries. How, then, can these changes be analysed and interpreted? What is revealed by the crises in historically constituted Welfare States and social protection floors on the one hand, and those triggered by the emergence of new social policies that require the financial participation of beneficiaries on the other? What can be said of the world's poorest countries and the recurrent problems they face in their attempt to fully benefit from international aid that seeks to fight against poverty and ensure that all people have some form of social protection?

Some visionaries believe that this may point to the progressive "reversal" of the world and of a social protection system that gradually takes into account "the other side of the planet". Such a development would symbolise the rise of the social question in developing countries and, ultimately, a potential reversal in the changes observed in relation to the levels of development and social gains. While the outcomes might differ, this situation once again reinforces Hegel's "dialectical worldview" and the historical materialism of Marx. Marx perceived the world as governed by contradictory forces. He believed that there were relations of production between dominant and dominated classes, embodied by antagonistic classes as well as by developed and developing countries whose situations would change after two centuries of domination. The most pessimistic Westerners are becoming alarmed, especially because of the roles some emerging countries are now playing on the international scene, notably China, India and Brazil.

Drawing on Rostow's model of social transformation, a different but more positive viewpoint sees the changes observed as simply a matter of "*catch-up growth*", ultimately enabling both the Southern and Northern hemispheres to come together in terms of development and social protection policies. This perspective enforces Fukuyama's "the end of history" insofar as it is based on a form of capitalism that puts people first and protects everyone irrespective of whether they are employees, self-employed workers, unemployed, sick, disabled or retired. These signs, however, may simply point to a transition, requiring countries to reposition themselves on the international stage, or they may lead to the

emergence of more or less differentiated models, regardless of the levels of development observed across countries. Worse still, this perspective may mean that the social question is gradually disappearing from the traditional model in a world that has become increasingly “global”.

Despite its unpredictability, the future must be built together. It thus seems crucial to observe the current situation in order to more effectively analyse the social question and policy contents, as well as the forms these policies might take in the different contexts observed in both developed and developing countries. We believe that it is possible to understand what is at stake over the short, medium and long terms.

What does progress or decline reveal?

What is the role of the economic model?

Can the social question remain a central concern for government or is it becoming an alibi of current systems? Is government expected to fulfil multiple roles such as driving a supposedly humanistic capitalism, rescuing people when conditions begin to deteriorate and acting as the established partner of economic and financial interests to ensure budgetary rigour in both developed and developing countries?

A closer analysis reveals that the social question provides useful insights into how the global world has changed. It shows how capitalism is able to take into account the social protection debate but points out the limits of policies that are maintained when the economic situation does not or cannot support them.

In the age of globalisation, the past can undoubtedly help decipher the present and may possibly shed light on the future. The past allows us to re-examine the questions and perspectives outlined above which, each in their own way, reveal the opposition between several completely different perspectives of what the future world might look like. To address these perspectives more effectively, debate is thus indispensable. It seems important to shed some light on the rapidly changing world and define what “living together” in a global world means. To this end, we must revisit the history of capitalism and re-examine how capitalism influenced wage labour and the protection of workers. By encouraging debate and reflection, such an approach will shed new light on the global movement of modern societies, as well as on how the social question has been grasped or, on the contrary, done away with. Revisiting history in an attempt to obtain a different view of the present also reflects the chapters in this edited volume. Indeed, this multi-authored book focuses on global changes and social policies in old and new worlds, as well as on the rise of citizen, alternative and innovative initiatives.

“Globalisation” has now become an unavoidable word in debate and studies about the different dimensions of socio-economic transformation, suggesting that the adjective “global” should no longer be perceived as an academic concept but rather, as a metaphor reflecting the complexity of the world in which we live. This metaphor evokes power relations and interconnections, spun like spider webs between multiple processes and actors who take action in order to develop a new diversity in the world. According to Peter Berger (2002), the word “globalisation” is heavily charged with emotions; it conveys and leads to the emergence of highly contrasted viewpoints between analysts and actors.

Certain people consider that globalisation is the emergence of a global civil society that promotes peace, democracy and respect for human rights and is concerned about an ideal world in which social justice and equal treatment of all people is promoted.

Others consider that globalisation is responsible for the destruction of many indigenous societies along with their specific cultures. There are also those who believe that globalisation involves the imposition of American hegemony and the globalisation of trade, and thus increases the solitude individualism of the mass of workers who are left without protection, experience forced job mobility and deteriorating working conditions, and have fewer rights. Globalisation is thus perceived as being responsible for weaker nation states insofar as it introduces new forms of governance at the local, regional and global levels. Governance across the different levels thus relies on multinational economic actors and social actors (NGOs in particular), as well as on resistance movements, protest movements and self-organisation.

Social, economic and cultural processes across the world are deeply marked by the conflict between neoliberalism and the respect for human rights. This conflict is reflected in political conflicts, the return of populism, and a nationalism that is tearing apart not only Europe but also other regions caught in the grip of security frenzies. Research focused on analysing the changes observed on a planetary level has found that globalisation comprises a set of processes with inconsistent and contradictory durations. Globalisation thus encompasses economic, legal and political dimensions. It transforms the social structures of the affected countries and societies as well as the individuals who live there. Globalisation leads to the emergence of problems whose solutions at the global level are largely yet to be invented.

As several researchers argue, analysing the processes at work when we speak of globalisation implies transforming the conceptual repertoire that informs the Social Sciences (Wiewiorka, 2013). This implies a shift from the paradigm of insurmountable frontiers (Wallerstein, 1991) between disciplines, imposed since the 19th century. As Wallerstein suggests, given that the world is a complex, open and interconnected system, analysing it requires researchers to adopt an interdisciplinary approach (Wiewiorka, 2013). Comparing different viewpoints is thus the only approach capable of taking into account the complexity of the processes in a world transformed into a system of multiple interconnections. The reader will be the final judge. The authors of this book undoubtedly make a modest contribution to a comprehensive program that also questions the heuristic value of the concepts frequently used to explain the social question in Europe and beyond. The comparative heuristic approach that some authors have proposed undoubtedly sheds light on the processes that are analysed in this book and which require the adoption of relevant modes of action.

Analysing globalisation requires us to analyse its historical dimension. Braudel and Wallerstein both argue that globalisation began in the 16th century at a time when Europe and leading industrial countries gradually became the centre of a world surrounded by close (Southern Europe and the Mediterranean) and more distant (Asia and the Americas) regions. Power relations gradually transformed this initial organisation of a global world: the centre shifted and became multi-faceted and the outskirts became industrialised and defined their own development strategies. At the end of the 19th century, the modern world-system was in place. Braudel's and Wallerstein's studies on how the European expansion and

colonisation helped shape the interconnected world-system found that globalisation was perceived as the Americanisation of the world (Lescent-Giles, 2003). It was driven by companies and industries in their quest for new markets. Many authors argue that globalisation began with industrialisation and the massive emergence of industrial work. This viewpoint is in line with the second dimension of our research question.

The social question also emerged with the advent of capitalism and the transformation of the rural masses, displaced from rural areas to find work in industrial centres and detached from their communities of origin. Quite rapidly, albeit amid workers' struggles, the social question forced the State to take on a new role from the 19th century onwards. It became the State's responsibility to protect vulnerable workers and address the demands for social justice that involved the right to work and to a dignified life: as Alain Supiot stated in his inaugural lecture at the College de France in 2012, "the only law that is absolutely indispensable is labour law" (Supiot, 2013).

The idea of two global movements on which we focus here has been defended by many authors. According to some authors (Aglietta, Le Cacheux, 2007), the first wave of globalisation began in the middle of the 19th century and came to an end on the eve of the First World War. It was decisively shaped by the rapid growth experienced worldwide. The second and on-going wave of globalisation was characterised by decolonisation which led to numerous imbalances and recurring crises, among them the crisis of the Welfare State. It is undeniable that the majority of studies on globalisation have focused on macroeconomic processes, capital flows, growth and competitiveness. A few studies, such as those undertaken by Berger and Huntington (2002), Appadurai (2001) and Bauman (1998), have analysed cultural and social processes engendered by globalisation, as well as the associated inequality and social costs. Although the ethical dimension of globalisation can be evoked, it must be said that, by affecting developed and developing countries unequally, the globalisation of flows and the relocation and transfer of economic activities has caused profound changes in the labour market. Supiot (2010) uses the term "the spraying of rights" to refer to these processes in the countries where these rights once existed. Bauman speaks of the marginalisation of groups of "human waste" produced through the same globalisation processes, in both developed and developing countries. These processes lead to excessive fear for safety and the fear of foreigners, expressed in populist ideologies and xenophobic attitudes. These two authors argue that globalisation increases inequality, even in areas where progress had already been made.

Political leaders at both the national and European levels are well aware of these effects. In 2006, the EU created the European Fund for Globalisation to better address the social consequences of economic globalisation involving the relocation of industrial activities. The objective of this fund is to assist workers affected by collective redundancies. The heightened awareness of the impact of globalisation at the European level suggests that the social effects of globalisation must not only be taken into account but must also be addressed with the support of supranational organisations such as the European Union. However, as Wasmer and Weizsäcker (2007) have pointed out, this poses a major problem. The authors show that international trade leads to the loss of 570, 000 jobs annually in the 27 EU member countries. One of the greatest obstacles to addressing this problem is linked to how profits and losses caused by globalisation are calculated. Leaving aside the

epistemological issues related to measurement, it appears that estimates of the benefits derived from globalisation in 2015 for all EU countries still differ much too widely to be considered reliable¹. While it might be difficult to calculate these benefits precisely, employees pay a huge price when companies relocate. Globalisation profoundly reconfigures the labour market and produces adaptation shocks that primarily affect certain groups of people in developed countries.

History shows that the social question and, in particular, the fight to ensure that all people have access to social protection is a long-standing issue which reached its peak during The Glorious Thirty. This suggests that the capitalist system drove the need for social protection and was forced to take this concern into account. It is thus interesting to see that social policies are emerging in developing countries. These policies are a sign of rising living standards but also reveal the need to take social protection into account if the system is to endure. It is, however, surprising that there is now a protective mechanism that developed countries had expected would encourage upward mobility but which, in reality, has encountered some setbacks; this decline suggests that the 1950s to the 1970s were undoubtedly exceptional years in the history of mankind.

How can the socio-historical context of the decline of social welfare observed in Europe and across other developed countries be described? Is it simply a matter of overcoming the economic crisis to allow the contributory system to regain its former glory? Does it reflect the rise of an economic model that generates a form of social protection that only caters for the poorest people in an attempt to ensure relative social peace? Wasn't this Braudel's view when he defined capitalism by highlighting the conditions of its emergence, i.e., capitalism requires a certain calm in the social order and neutrality, weakness and even complacency of the state?

To address these issues, it seems necessary to observe what is happening "elsewhere" in countries where social protection policies are still in their infancy and are thus distinguished by their innovation and inventiveness, or on the contrary, resemble policies in place in developed countries. This comparative approach makes this edited volume more meaningful and assertive. It makes it possible to go beyond what a simple analysis of developed countries would achieve.

While the adoption of the economic model on a global scale seems to have progressed at a rather slow pace, social protection, which is an integral part of the model at least at some point, appears to have progressed at an even slower pace. Has social protection in developing countries developed at a much slower pace than the adoption of the economic model from an economic perspective?

It is now widely accepted that considerable differences exist in the level of development of developed and developing countries. Moreover, there is still a massive gap between the social protection systems in poor and rich countries. It is worth noting that the vast majority of the 28% of the world's population that receives "complete" social protection as defined

¹ These were estimated at 142.5 billion euros by the Carnegie Fund, 243 billion euros by the World Bank and 848.5 billion euros by the UK Treasury (Wasmer, Weizsäcker, 2007, p. 235)

by ILO² live in developed countries and in a handful of developing countries (Brazil, Colombia, Algeria and Thailand). Conversely, 50% of the world's population without protection lives primarily in poor countries (Polet, 2014). These differences are often explained by the differences observed in wealth production and the important role played by the informal economy in developing countries. Indeed, certain orthodox economists argue that the informal economy is decisive as it makes it impossible to finance social protection policies. This suggests that social protection is closely tied to the extent to which the labour market has been formalised. It is also worth mentioning that many entitled beneficiaries still encounter difficulties in accessing adequate protection, revealing the precariousness of protection systems based on European models. These observations show that social welfare and social security systems (Bismarckian or Beveridgian) that have shaped the social protection models in developed countries have encountered great difficulty in developing countries. It must be said, however, that not all developing countries should be perceived in the same manner.

From a historical perspective, the first signs of welfare states in developing countries date back to the 1920s and 1930s for some countries in Latin America, and a little later for countries that experienced colonial rule. Initially, they were organised in the form of contributory schemes for wage earners, primarily civil servants, military forces and employees in the formal system. Later, following better economic situations or international aid, social protection was expanded to "target" populations and was based on welfare policies. These developments were all swept away following the eruption of the debt crisis and the implementation of Structural Adjustment Programs (SAPs) in the 1980s, especially because it became necessary to boost economies and restore fiscal balances. It was not until recently (over the last twenty years) that the social question re-emerged, in the wake of the disastrous consequences of the Washington Consensus and neoliberalism, both of which considered that the solutions to developing countries' "pains" lay within States and social policies. While the application of the most orthodox theories has ceased to be valid, the Welfare State also seems to have lost its significance. In this respect, emerging or developing countries are still largely dependent on the policies promoted by the international community, notably the World Bank, OECD and the European Commission which favour the development of non-contributory programs targeting the poorest people. Presenting the experiences undertaken in Brazil, Mexico and South Africa, leading by international institutions have shown these programs in a good light. Supporting and protecting the most vulnerable populations pushes aside the concepts of universalism and social citizenship at the global level. The emergence of social transfers for "target" populations also destroyed all prospects for the universalisation of social rights. These transfers, however, were more

² The ILO Global Jobs Pact identifies, among the main elements of the social protection floor, "access to health care, income security for the elderly and persons with disabilities, child benefits and income security combined with public employment guarantee schemes for the unemployed and working poor" (ILO, 2009, Recovering from the crisis: A Global Jobs Pact).

promising than the previous attempts to eliminate all forms of assistance and protection for the poorest people. It is clear that, in the meantime, such policies help mitigate the inevitable social shocks in economies integrating increasingly shifting world markets.

Close observation of the strategies promoted by the World Bank and OECD clearly reveals that the liberal ideology now dominates the development and implementation of public policies. Minimum wage, working time limits, paid holidays and even child labour are no longer the central concerns of the international organisations (World Bank "Doing Business", 2013) with the greatest resources and capacities. Conversely, in this "well designed and carefully targeted" protection (Mestrum, 2014), the social protection driven by the State has become synonymous with the fight against poverty, a condition perceived as a threat to security and one which could destabilise the smooth functioning of the system. It has thus become the responsibility of those who do not fall within the "excluded category" to obtain their own social insurance through private insurance that can be "consumed" in the market. Under the guise of poverty eradication policies (MDGs), neoliberalism has finally insidiously penetrated mentalities and done away with all prospects of social protection for all.

As we mentioned earlier, the decline of social protection in developed countries and the first tentative social protection steps observed in developing countries show that social protection must be included within social agendas. Naturally, this implies an overall increase of social protection at the global level. It also signifies the decline of universalist ideologies which are based on social citizenship, and the widespread rise of social protection systems that target specific groups of people defined as "vulnerable". Differences within the same social protection system are thus common.

Social achievements undoubtedly resulted first from workers' movements and then from certain governments' actions. However, the fight against the different forms of exploitation was primarily responsible for the most visible social changes in the developed world. This era has seemingly come to an end, notably because political leaders have less control over the economy. Subsequently, governments have now become partners or even allies of the economy's operating rules. The question then arises as to whether social protection has become an alibi of the liberal model, enabling it to more easily achieve its objectives. Might political leaders who initially fulfilled a protective role become, at their own expense, the greatest detractors of the social question and play into the hands of the system and the dominating forces? While social protection systems in Europe and in developing countries largely differ, they share the same philosophy. Indeed, with the emergence of a State which primarily seeks to protect markets, both regions comply with neoliberal policies.

It thus appears that one of the most visible dimensions of globalisation falls within an essentially neoliberal perspective, mapped out and recognised in the 1970s when Hayek received the 1974 Nobel Prize and Friedman received the same award in 1978. From the 1980s, "the IMF and the World Bank became centres for the propagation and enforcement of 'free market fundamentalism' and neoliberal orthodoxy" (Harvey, 2005), reflecting the dominance of neoliberal orthodoxy that contributed to increased inequality. In 1996, the fortune amassed by the 358 richest people was equivalent to that of 45% of the world population, i.e., 2.3 billion people (Harvey, 2005, p.35). This trend has increased over time, even though the gap has narrowed in some countries. More than ever before, the richest

countries with the greatest capital and control over economic decisions share a common view and have incorporated the international scene. Ordinary consumers have also been caught up in the globalisation trap. In contrast to the freedom once envisioned by Polanyi (Polanyi, 1954), major distribution groups have imposed certain forms of consumption and thus introduced the standardisation of tastes in the global market: “The good freedoms are lost, the bad ones take over” (Harvey, 2005). While this process revolves around the transformation of labour, capital accumulation and labour laws, the commercialisation and commodification of labour are also at work. The Welfare State lacks the means to accomplish its mission of protecting the most vulnerable people. These people, who are no longer even granted citizenship, lose control of the economic sphere because of their inability to cope with massive unemployment problems. The “precariat” has now become an urban form of life, both in underdeveloped countries and at the very heart of Western countries where the spread of ghettos and the emergence of slums have gradually increased and now contain marginalised people deprived of their civil rights (undocumented immigrants) and social rights.

In this regard, comparing developed and developing countries provides useful insights. This comparison reveals that history has repeated itself, as have the early signs of this groundswell which, in retrospect, have been discernible since the end of The Glorious Thirty.

As mentioned earlier, the changes observed were marked by two major developments: first, the SAPs imposed on developing countries from the 1980s abruptly removed all possibilities to extend social security in poor countries. The second and more insidious development was the introduction of the fight against poverty from the 1990s to the 2000s, marking the end of universalist social protection policies. The on-going crisis in developed countries is a last warning shot against a model dismantling hard-won benefits obtained in the 20th century. Both developed and developing countries have thus been caught in a clearly top-down and bottom-up spiral, but one in which there are surprising similarities: the end of the Welfare State on the one hand, and a stillborn Welfare State on the other.

What are the possible avenues for reflection? Put differently, what frameworks for reflection might the contributions presented in this book provide? There are signs that all hope may not be lost.

Citizen initiatives that are now emerging in developed countries are among the potential perspectives and changing viewpoints that have succeeded in imposing themselves. Haunted by uncertainty and anxiety about the future and forced to act, men and women are now locally reinventing micro-systems to ensure protection, solidarity and self-management. These men and women are reinventing humanity in places where “bare life” has taken possession of human beings placed in zones of social invisibility (Appadurai, 2013, p.147). A closer look reveals two intertwined perspectives: solidarity and a spirit of resourcefulness. Consequently, some urban agriculture projects driven by individuals or communities fall under more or less alternative forms of development whose proponents are anxious to return to a local economy, promote healthy eating, re-vegetate cities and promote the rebuilding of social ties. The emergence of a “bootstrapping” economy is also evident, notably through the sale of products in either the formal or informal system. Other activities include the development of homestay (Airbnb) or carpool initiatives which, in addition to

enabling those seeking to reconstruct social ties, provide a small income or saving to those in need. Undoubtedly, it is necessary to question what this emerging or re-emerging movement in developed countries implies. This movement has come at a unique time in history, i.e., at a time when the Welfare State has “opted out” and the economic crisis seems to have taken root.

The emergence of citizen initiatives within the context of social protection is more difficult to envisage, notably because issues of pension, health and unemployment insurance involve more sensitive areas, and their implementation is rather difficult. This book, however, explores the experiences that have attempted to address these issues, counteracting the decline of social policies.

In addition to emerging citizen initiatives, an increasing number of people have shown interest in “communities”, especially social communities. In an increasingly dehumanised world, these communities seek to re-inject a political dimension of living together.

When citizen initiatives emerged at the approach of the 21st century, there were initially two highly differentiated movements: while the first focused on defending public services disrupted and weakened by the liberal thrust, the second focused on environmental concerns. Today, the gap between the two movements has narrowed, notably because public goods and natural goods both designate the capitalist system as chiefly responsible for the world’s crisis. Moreover, the “common” issue has gained importance at a time when neoliberalism has profoundly and insidiously transformed the face of the State, its functions and its forms, showing how State ownership in no way ensures sharing, solidarity and redistribution (Dardot & Laval, 2014).

In an increasingly interconnected and global world exposed to climate, health and economic crises that know no boundaries, can we speak of the renewal of the paradigms which, until now, have determined how we view the world and address the social question? Might this “new” ideology and the observed practices be rooted in the philosophical and economic ideologies promoted in developed countries? What is the impact of “original productions” undertaken in developing countries hardest-hit – as was once the case in Europe – by the transformation of rural masses into wage workers?

This multi-authored book compiles the different forms through which the social question has been addressed in a global world. Drawing on a historical and comparative perspective, academics from developed and developing countries, sociologists, lawyers, economists, anthropologists, geographers and urban planning specialists present the social dynamics involved in the transformation of the forms of the social question, and of how this question is viewed across the world. They question not only the effectiveness of public policies and the impact of their absence, but also the relevance of the theoretical concepts used to analyse these policies. From the outset, this book thus adopts a transcultural, transnational, comparative and critical perspective. It seeks to inform the discussion on how public and private institutions and communities at large have addressed the social issues affecting vulnerable people in both developed and developing countries, irrespective of whether cross-border migration has occurred or not. What rights do these people have? What

protection and assistance might they expect? Can they provide their own local solutions to address poverty, health issues and the absence of the most basic rights?

In an attempt to address these issues, this book is divided into five parts in a deliberate step-by-step approach. It begins by analysing the major developments of the social question on a global level and then takes on a comparative approach to address social protection policies in several developed and developing countries. The book ends by highlighting the existent citizen initiatives to date, revealing not only the forms of solidarity common in the past but also the new forms of solidarity given the recent history of the Welfare State in rich countries.

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