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Glocalizing methodology? The encounter between local methodologies[1]

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Europe and USA have been the cradle of methodology. Consequently most of the contemporary methodological knowledge has been invented by Western academic culture. Throughout the twentieth century this indigenous culture has been transformed into a type of general knowledge, and social science methodology has become one of the most globalized knowledge. However the limits of globalization are evident in many fields, from economy to politics, from marketing to culture and social life. Methodology is not free from these limits. There is an emerging need for finding postcolonial methodologies and making culturally flexible contemporary research methods. The author explores the proposal for a glocal methodology, the possibility of thinking (methodologically) global and acting (methodologically) local, and its ambiguity. Finally, indigenous methodologies and participatory action research are questioned as effective ways out of methodological colonialism.

Keywords: globalization; survey; in-depth interview; glocalization; reflexivity

1. Overview

If one wanted to undertake an ethnographical study in the Maya villages of Zincatela and San Juan Chamula, in Chiapas (Mexico), one should be careful about the following: no photos are allowed in the church or of the people in this area due to the belief that photos will capture the soul, and if someone leaves the village with the photo then their soul goes with them. Mayas do have some photos in the tourism office (which are okay because they stay in the village), and some child beggars allow you to photograph them for coins. However tempting the setting, phototaking is often a touchy subject. What is this improvising researcher teaching us? That also within visual methods there exists a colonial methodology legacy.

2. Preliminary remarks

Europe and then the USA have been the cradle of contemporary methodology: most of the methodological knowledge stored in textbooks has been invented by a Western academic culture. Social research methods created by a *local* culture have become throughout the twentieth century a type of *general* knowledge: journals, handbooks, and textbooks that have slowly transformed a locally based product

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with general and context-free principles. Consequently social science methodology is one of the most globalized knowledge. Particularly from the 1950s there was a sort of colonization (in this case an Americanization) and then the globalization of methodology.

However, whether these research methods have been tacitly proposed as universal, suitable for every culture, the US academic cultural frames and schemas lying beneath them are still local. The attempt at decolonizing contemporary methodology requires a reflexive investigation of what are the common-sense assumptions, conceptions, or ideologies behind research methods such as questionnaires, interviews, participant observation, conversation and discourse analysis, focus groups, and so on, because traditional research methods do not work adequately for several reasons.

This inquiry raises a challenging issue: while European or the US societies are multicultural (native European or American people live together with Afro-Americans, Latinos, Indians, Vietnamese, Chinese, Moroccans, etc.), many methodologists and researchers still use monocultural methods. The need for finding democratic and postcolonial methodologies working with multicultural populations helps make contemporary research methods 'culturally flexible.' The challenge is to transform a Western academic method into a multicultural one, in order to make it sensitive to ethnic issues (in addition to gender issues). Using the 'local/global' dichotomous economic category we might pursue the craft of a 'glocalized methodology.'

3. The globalization of social research methods

Contemporary methodology originates in Europe. Later on it received a new and great impulse from the USA. Research methods were used around 1850 in France and later on in the UK (Seger, 1972); slowly they spread to western Europe and the USA. In this movement of diffusion of social research methods we can very roughly single out at least three steps:

- *European domination* (1850–1930) in social sciences, philosophy, epistemology, and methodology until the arrival of Nazi-fascism in Continental Europe;
- *European cultural colonization* of the US universities in two stages: from the early 1900s by immigrants and from the 1930s by European scholars who escaped from Continental Europe;
- *globalization,* i.e. the American cultural and Anglophone colonization of Continental Europe (1950–) and a considerable part of the world, stating a US/UK domination in science and methodology.

From the 1950s we are witnessing the spread of the methodology from the USA to Europe, Latin America, and the rest of the world. On the wave of the economic, cultural, and political dominance exercised by the USA after the World War II, the world was invaded by American products such as music, movies, food and beverage, cigarettes, and so on. Science and methodology, as cultural products, were exported too.

The indigenous research methods that had existed in many countries until that time (research in the fields of sociology, psychology, economics, statistics, etc. had been developed for a very long time) were affected or surpassed by research methods and techniques coming from the USA (e.g. Thurstone scale in 1928, Likert scale in 1932 or Osgood's semantic differential scale in 1957).

As business economists know, 'globalisation involves developing marketing strategies as though the world is a single entity, marketing standardized products in the same way everywhere (...) it embodies the view that the world is a single market' (Vignali, 2001, p. 97).

In the case of the survey, beginning in the 1930s, the model developed in the USA began to spread to the rest of the world, first to Europe and then to Latin America, Asia, and Africa (see the *Barometers* across the world). Countries that had not previously been exposed to this type of knowledge (such as Asian and African countries) began inviting American and European scientists to their universities to activate local survey programs, or sent their own researchers and students to train at Western research centers. The adoption of the survey model in these countries was associated with the idea of progress. Traditional forms of inquiry among local cultures came to be considered obsolete, and the survey was seen as an instrument of modernization and scientific advancement.

Smith, Fisher, and Heath (in this issue) argue that the survey has become a new global cultural system, promoted through increased communicative exchanges among researchers from different countries and the export of technological models to the (so-called) Developing Countries. The worldwide dissemination of a model of knowledge based on the survey has come into being also through the construction of a specific cultural system consisting of values, norms, conventions, infrastructures, standards, and procedures. These standards contribute to the formation of a new globalized methodological culture.

4. The role of the English language in the globalization process

During the following decades, research methods, as conceived and crafted by American authors, were tacitly described, proposed, and publicized as context-free knowledge, as useful and appropriate tools for studying every culture.

On the wave of economic, political, and cultural US colonization, English became a very powerful language, as much as Latin during the period of Roman domination, and that of the French between the 1800s and 1900s. The English language contributed enormously to the globalization of US methodology and Anglophone research methods. This could explain why England, notwithstanding it had lost most of prestigious and power deriving from its empire, maintained a more prominent position than France and the USSR that also were present at Yalta; in addition, it could explain why academics, although living in *economically* marginal or poor countries (as Wales, Scotland, Northern Ireland, New Zealand, or Australia) have taken part in the methodology.

From the 1950s, English, a language spoken in a relatively small area (it is the third spoken language only, after Chinese and Spanish), for commercial and cultural reasons slowly became a universal language, performed in the wider world as a sort of *lingua franca* (as Latin or French in the past). English not only became the common language in business, but also in communicating scientific results, findings, and theories just as Latin did until the 1700s: Francis Bacon (English), Galileo Galilei (Italian), Carolus Linnaeus (Swedish), Johannes von Kepler (German), Nicolaus Copernicus (Polish), and many others scientists wrote in Latin.

The effects of this linguistic change are numerous and important:

- researchers who speak and write in English increased their chances to communicate with colleagues in other countries and to publish their ideas;
- on the contrary, researchers who know German, French, Spanish 'only' (just to point to some other languages) could not take part in the anglophonization of scientific communication;
- English started to be taught in schools everywhere and classes in German, French, Spanish, Italian were reduced all over the world;
- national English publishers (especially of textbooks and handbooks) gained new markets, beyond their national audiences, and became international;
- journals written in English had the chance to achieve prominent positions;
- the language in international conferences became English and in few years Anglophone speakers became the only ones who (without any training) began to talk simultaneously a local and an international language.

What has happened in fields of methodology is a synecdochical phenomenon: a slow and tacit juxtaposition between one national language (English) and the international context. In other words, local (Anglo-American culture) became international and universal. Its local way of thinking about methodology and research methods became the general way of framing research problems. This happened in journals, textbooks, handbooks, and publishers. However, this is just the opposite of what international should be. Among business economists 'internationalization' 'involves customising marketing strategies for different regions of the world according to cultural, regional, and national differences to serve specific target markets' (Vignali, 2001, p. 98). For this purpose altering and adjusting the marketing mix determinants are essential and vital to suit local tastes, meet special needs, and consumers' non-identical requirements (Czinkota & Ronnenken, 1995).

4.1 Journals

A clue to this subtle confusion (a confusion that was sparked in the 1960s and increased after the Fall of the Berlin Wall, that is in the postmodern era) can be traced in the titles of many social sciences journals: many of those founded before 1970s were titled *American Journal of Sociology (1895)*, *American Anthropologist (1898)*, *American Sociological Review (1936)*, *American Behavioral Scientist (1956)*, *American Sociologist (1970)*, *British Journal of Sociology (1950), British Journal of Disorders of Communication (1966)*, and so on. These titles probably testify a greater consciousness of the cultural limits of their enterprises and their national targets. Today we have a large number of journals (the majority founded after the 1970s) which have in their title the word 'international': *International Review for the Sociology of Sport (1966)*, *International Journal of Intercultural Relations (1975), International Criminal Justice Review (1991)*, *International Small Business Journal (1983)*, *International Relations (1987)*, and so on. In addition, many journals that do not have such a word in their titles state 'internationality' in their editorials as the main mission of the journal.

An institution is really international when different cultures or nations are represented in its board (see International Sociological Association), even if they do not have the same power. Nonetheless, the editors, the associate or consulting editors, and the reviews editors of some of these 'international' journals (as those above) are mainly governed by American and English colleagues, along with some Canadians or Australians, and a few non-Anglophone scholars, usually on the editorial boards.

This social process of slowly transforming the original meaning of 'international' can be elicited from the excerpt of an editorial presentation of a well-known UK methodological journal: 'The international nature of the journal is being maintained in three ways. In this issue alone we have authors from USA, from Wales, from Northern Ireland and from Australia ...' (September 2001). The editors do not appear to be aware that these authors were all Anglophone.

English-based language journals are more willing to publish articles based on research conducted in Anglophone countries than in others. This policy would be acceptable if these journals considered themselves as domestic publications. However if they conceive their enterprise as international, the contradiction seems evident. Also an important amount of their subscriptions comes from non-Anglophone countries.

These cognitive and procedural schemas also involve referees. A colleague of mine, co-editor of another fairly known UK methodological journal, wrote immediately back to me a kind email message when I sent a manuscript for a peer-review process:

> I'll deal with the article, so you don't need to send it to anyone else. What I would like to know from you, though, is someone you would like to nominate as a referee. We use several referees who we select ourselves, but I would also like to give you the chance to suggest someone who is known the field and, perhaps, especially in the Italian context. Sometimes our referees want people to know all the English literature on the topic, and this is not always appropriate. (Summer 2003)

This ethical and politically correct position reveals referees' tacit and unconscious ethnocentrism, which sometimes becomes a source of discrimination against non-Anglophones who are quite easy to detect even in a blind peer-review process: some grammatical errors, writing style, a partial quotation of the whole English language literature, non-Anglophone authors' citations, some 'foreign' research examples, and so on are the main clues for referees in order to detect a foreign paper.

4.2 Publishers

Not only authors and their writings, but also publishers play an important role in the construction and diffusion of scientific knowledge. More than journals, publishers are very locally based enterprises. The internationalization or globalization, which has penetrated into multinational companies, is a long way from showing up in publishing companies: their management, employees, and recruitment are still set up mainly on a local basis. This probably affects publisher's decisions on what kind of material to publish, as we can learn from the methodologist Alasuutari's experience:

> There was one of the problems I ran into when preparing the English-language version of my qualitative methods textbook *Researching Culture* (...). My publisher expressed a concern about the fact that in the book there were plenty of references to studies that had been published in Finnish:

> At the basic level, the proportion of Finnish work cited in the text will not be helpful to British, American or other readers, to whom this literature will not be readily available or familiar ... Would it be possible to rework the text as you go along so that references of this kind are replaced by references to examples, which are fairly well known in the English language literature? I am not asking you to completely empty the text of any Finnish connection, but to ensure that the overall balance makes the English language reader feel at ease with the presentation.
>
> The request was quite understandable, and I did change several research examples into work that had appeared in "internationally" published books or journals. (2004, p. 495)

This way of thinking gives more credit to native Anglophone authors and partially explains the reproduction of the Anglo-American dominance in social sciences and methodology. To obtain a rough estimate as how dominant the Americans and Anglophone authors are in the qualitative research market, Alasuutari went through the list of the books classified under 'qualitative methodology' on the publisher's catalog up to May 2002: 'Of the 217 books listed there ... the English-speaking countries held 91% of the "market", and the USA and UK alone had an 80% market share' (2004, p. 597).

There are two main reasons that explain this phenomenon: commercial and cultural.

The first one is quite obvious: the Anglophone world that roughly overlaps with the Commonwealth is a huge and self-contained market, probably the biggest academic and educational one with a great number of college students. A book suitable for this market represents a good business for publishers.

The cultural reason, as Alasuutari (2004, pp. 598–599) pointed out, has to do with the concept of 'modern society.' The USA is still considered as the prototype of modern society, the social structure which other societies refer to or try to emulate, the center of the world, the stage of events, places, or VIP we are supposed to be familiar with:

> If we for instance analyze an American television series, pop star or film, or a British celebrity such as Princess Diana, it is quite acceptable in an international publication (...) such objects of study in themselves represent phenomena 'of general interest', because 'everybody' is supposed to know them. The same is not the case if one analyzes people, places or phenomena deemed peripheral from the center position. The reason why the audience should read analyzes of more remote objects has to be made explicit, and in doing so we often relate the object in question to related phenomena in the center. (Alasuutari, 2004, p. 599)

For publishers and series editors what happens, let's say, in Germany and Italy is exotic or it has a German or Italian relevance only. What happens in the USA has a worldwide relevance. However, from a reflexive point of view, this is very ethnocentric reasoning. All the same, it is common that a British publisher, in order to make a publication 'international,' might ask the editors of a book to insert an American scholar into their team! Why not an Indian, a Chinese, an African or a Latin American scholar? Are not there good or outstanding scholars in those continents? Does it matter whether or not they have published in English? What are the criteria to evaluate the intellectual standards of an author? His/her (short or long) list of publications in English? Does the quality of the contents of the book proposal matter or extra-scientific considerations prevail?

However, to get my point across, I do not question publishers' politics. I think they are right on pursuing this plan because they are, first of all, commercial enterprises following so-called 'market rules.' However, from a scientific perspective this ethnocentrism can damage (and it has) methodology and research methods (Brannen, 2005, p. 276). The claim of a culturally local product (e.g. from USA or Canada or Australia or UK), to set up methodological principles and rules to be applied in other cultures (potentially in all cultures), as methodology is quasi-universal, is no longer reasonable. This will be clearer through a closer analysis of two main research methods: in-depth interviews and surveys. They are the most common research methods. So it is useful to begin from them to discover the local cultural roots of methods that have subsequently colonized the whole social research world.

5. The Christian cultural roots of in-depth interviews and surveys

In the past, several authors have explored the roots of surveys and interviews. Gostkowski (1966) highlighted their social philosophical background and underlying ideology. David Riesman, Mark Benney and Everett H. Hughes, Aaron Cicourel, Jean Marie Converse and Howard Schuman, John Galtung, David Silverman, Jaber Gubrium and James Holstein, among many others, have pointed out additional cultural frames underlying these methods: an atomistic conception of society, the over-represented role of the individual, the interview as a product of modernization.

Surveys and in-depth interviews share the same strong individualist social philosophy (Gostkowski, 1966). This ideology has its roots first in Christianity, and then in the Enlightenment culture of the eighteenth century and in American utilitarianism of the 1900s, which propagated a notion of society as a collection of individuals: the primacy of the person was a Christian notion, in fact, because ancient Greece gave priority not to individual subjectivity but to the Whole (the cosmos) of which the individual was a subordinate part. But then Christianity, and Saint Augustine in particular, prioritized the subjectivity of the individual, and thus distinguished the self from society. Saint Augustine laid the basis for the view of the world as 'object' and the self as 'subject,' so that the individual was separated from the natural order. This individualist ideology assumed that each of us acts in some way independently from others. In addition, it has also conditioned the base philosophy of sampling techniques, which are still too closely centered on the recruitment of individuals rather than groups. The in-depth interview and the survey are therefore based on a traditional voluntarist conception of social actors as flesh-and-blood individuals. They are consequently at odds with the recently developed cognitivist, systemic, constructivist, and ethnomethodological theories that view society as a network of relations and communicative exchanges.

Gubrium and Holstein have recently reexamined the debate conducted in the 1950s on the origin of the interview. This reflexive move has had the great merit of reminding us that 'no longer should we regard the interview as simply an instrument of data gathering technology; it is also an integral part of society—now more decidedly than ever' (2001, p. 12). Gubrium and Holstein maintain that the interview was born at a particular moment in the history of society and embodied some of its cultural features. Indeed, there was a time when the interview as a social form simply did not exist. Specifically, according to the reconstruction conducted in the 1950s by David Riesman, Mark Benney, and Everett C. Hughes, the interview came into being in the early twentieth century. As such it was a product of modernity, and it reflected 'the modern temper.' The interview was consequently a product of a change in social relations whereby it gradually became normal to converse with strangers, to express one's opinions in public (with the consequent shift in the boundary between public and private opinion), and more recently, to display one's feelings and emotions overtly. As a well-known expression of Michel Foucault states, the interview is one of the 'technologies of the self,' one of the devices for the modern invention of subjectivity, an institutional practice intended to create the idea of 'individual' and to stress personal points of view.

6. Western tacit cultural assumptions embedded in the survey model

Several cross-cultural studies, especially by action–research practitioners, have documented problems with survey methodology in studies of (a) poor and/or illiterate people, (b) highly educated people (managers, intellectuals), and (c) people belonging to non-Western cultures.

Surveys collect information through conversation. It is no ordinary conversation however, but a particular type pertaining to a specific form of social interaction which arose in a particular period in the history of the West. This means that the interview is an outright cultural product and not merely a research technique (Silverman, 2000, pp. 89–100) and the type of interaction that takes place in a survey is not universal, neutral, or culture-free. On the contrary, specific (cultural) skills, tacit knowledge, and sociological conditions are required to sustain the particular social encounter called the 'interview.' As Galtung (1967) and Cicourel (1974, p. 136) have noted, the modern survey is an instrument invented by the academic middle class which is appropriate only for examining other members of the middle class. Higher and lower classes are therefore culturally alien to it. In addition, it is not simply an opposition between East and West, but more precisely between modern and premodern cultures, which (as we shall see from the examples) cuts across the two poles.

In any case, the Western local tacit knowledge that formed the basis of the survey long ago is still embedded in it. Such knowledge includes:

- the sense that it is acceptable to have conversations with strangers (interviewers);
- the ability on the part of the interviewee to speak for himself, and an awareness of himself as an autonomous and independent individual;
- experience in giving information in telephone interviews without seeing the face of the interviewer, and a willingness to interrupt everyday activities to answer questions over the phone;
- an extended concept of public opinion (Deutscher, 1973), necessary for communicating opinions and attitudes and describing behaviors considered private in a pre-industrial society;
- particular language skills, described by linguist and sociologist Bernstein (1971) and Labov (1972) including the ability to speak 'properly,' coordinate conversational turn-taking, connect concepts (thought) and words (language), acquired through education;
- the capacity to describe inner states (feelings, emotions), again related to education;
- a knowledge of etiquette and the implicit conventions of dialog, including the manners and rituals of the interview;

- the use of the standard form of the national language (in many countries, where dialects are pervasive the national language may not be perfectly understood by all the interviewees). Because the USA for most of its history did not have dialects, but rather only one national language (now some USA states are bilingual) this problem never arose. This is another clue about the role of tacit knowledge in crafting a methodology;
- the predominance of a written culture over an oral one (although there still are illiterate people who have problems with handout cards and other written artifacts);
- the existence of a (substantive, not only formal) democratic political system with a fairly strong civil society, which creates a context for answering freely;
- no assumption that the interviewer should be competent on the topics explored by surveys.

The absence of any one of these cultural and tacit preconditions, which constitute the 'interview society' (Gubrium & Holstein 2001) leads the survey into difficulty.

7. Cultural troubles with survey: lessons learned

The cultural features and tacit knowledge embedded in the survey emerge most clearly when the methodology runs into serious trouble in its application.

The Russian psychologist Luria (1974) interviewing illiterate peasants at the beginning of the 1930s in Uzbekistan notes their lack of ability in abstract reasoning about their feelings, identity, personality, and family. The American anthropologist Moerman (1974), interviewing among the Lue people, people of Thailand, states that they are not able to answer abstract questions like 'Who is a Lue?' and 'What is appropriate Lue behavior?' The Norwegian sociologist Ryen (2004), reporting on her field experience in Tanzania, Kenya, and Indonesia, pointed out that informed consent is an ethical preoccupation and cultural artifact of Western societies and is inappropriate in oral cultures. In China and Singapore, conventionally considered authoritarian political systems, (Wai Teng Leong, personal communication 2004) has detected a tendency on the part of the interviewees to give affirmative answers ('acquiescence' or 'yea-saying'). Deferential behavior has also been noted among indigenous people of Kenya: because they are so respectful of strangers and foreigners, natives offer positive answers so as not to contradict interviewers (missionaries' reports). In rural areas of China, where many women have very little personal independence, including use of the media, the question 'What sorts of programs do you like to watch on TV?' is inappropriate. Seeing that 'the large majority of households only have one TV set with a limited numbers of channels, and it may be the male head of the family who decides what to watch' (Wei, 2006, p. 211), women respond in interviews that they like programs that they have not actually chosen themselves; they 'often consume the media as a household rather than individually, and they often cannot see the point of a questionnaire worked out by an urban intellectual, so none of [their] answers would give you any reliable data' (Wei, 2006, p. 212).

This review of cultural and social problems connected with the survey might give the impression that it is only in non-Western societies that this methodology does not work properly, and that it remains adequate for use in Western countries.

The borders between East and West, North and South, however, began to dissolve in the twentieth century. Today, Western societies are multicultural and the East is in the West (Goody, 1996), the South is in the North: Hindi is spoken in London as well as in New Delhi; Turkish is the second language in Berlin; Spanish is the second language of the USA.

Secondly, several studies indicate that the survey is sometimes inadequate in Western societies as well. The yea-saying tendency mentioned above has been revealed in Norway among the elderly (Moun, 1988) and in the USA among African-Americans (Bachman & O'Malley, 1984).

In addition there are sometimes gaps between researchers' and respondents' culturally established way of framing concepts and meanings. Boccuzzi (1985, p. 251) found that in the Taranto district (southern Italy) many respondents were puzzled about using 'satisfying/dissatisfying' response alternatives to label their feelings about their jobs – it was clear they were not accustomed to associating an adjective referring to pleasure with work. Generally speaking poorlyeducated respondents are not able to use Likert-type scales, that is to align their thoughts to response categories such as degrees of 'consent' or the extent to which something is 'favourable'. They conceptualize issues using the categories 'true/false' or 'right/wrong' (Pitrone, 1995, p. 55). Interviewing 100 parents in Lombardy (Northern Italy) Lanzetti (1993, pp. 28–29) reports that only 23% of the respondents used the response alternatives correctly and without difficulty, 30% could not make them out 4 times out of 10, and 47% (mainly less educated respondents) had problems every time.

These ethnographic and statistical accounts highlight the problem with questionnaire response alternatives. The multiple word-meaning phenomenon is something that survey researchers in contemporary societies can expect to encounter almost everywhere for at least two reasons: the increasing presence of migrants who are not fully competent in the local languages and the great numbers of native dialect speakers.

8. Deracializing statistics and decolonizing the survey

A number of authors have posed the question of whether the globalization of the survey 'has led to the dominance of a particular intellectual framework and set of assumptions that may not be quite so appropriate outside their original homes' (Heath, Fisher, & Smith, 2005, p. 303). In other words the export (for example) of standardized questions largely developed in the West has been accompanied (perhaps as a consequence) by the export of a broader intellectual understanding of the public opinion and of the appropriate concepts for describing public opinion. Particular questions also embody particular intellectual traditions (Heath et al., 2005) and tacitly impose Western cultural frameworks.

Not only surveys, but also statistics embody a colonial logic. Zuberi and Bonilla-Silva (2008) have collected several contributions from scholars that show how 'statistical analysis was developed alongside a logic of racial reasoning (. . .) The founders developed statistical analyses to explain the racial inferiority of colonial and second-class citizens in the new imperial era (. . .) as part of the eugenics movement' (p. 5) inspired by Francis Galton in the second half of the eighteenth century, founder of the biometric approach and supporter of 'White supremacy' (p. 17). These authors state that the decolonization passes through 'the complete deracializazion of statistics, and "race" itself (. . .) [offering] a new way of thinking about how to model structured interactions within social institutions and covariation of racially structured interactions across institutions' (Zuberi & Bonilla-Silva, 2008, p. 21). The authors pursue the goal of liberation 'from White logic and White methods in sociology and the social sciences' (p. 23).

However the decolonization of surveys also goes through the recognition that there is not always equivalence between concepts under investigation. Cultures have their specific characteristics, which may sometimes be incommensurable with one another. There may simply not be common concepts to measure, e.g. the concept of God may be specific to certain religious traditions. There could be a nonequivalence of meanings at least on three different levels:

- *Across countries* – the lack of functional equivalency among responses to identically worded questions may be a result of the complexity of the concepts contained in social surveys (e.g. 'nationalism,' 'democracy,' 'religiosity,' or 'corruption').
- *Inside countries* – plural and multilingual societies with a high proportion of migrants and nonnative speakers must deal with similar language issues.
- *Across social categories* – social class, gender, education, or age may interfere with shared understandings.

9. No method is without original sin ...

The analysis of the in-depth interview and the survey that we have elaborated so far should also include other research methods that on the surface look less colonial. For example, what is the tacit idea of society embedded in the focus group method, born from the encounter of a European (Paul F. Lazarsfeld) and an American (Robert K. Merton) in the World War II US society? Probably that the society must be democratic and people must be free to share its opinions? However, how many democratic societies exist in the world? Focus groups are possible in authoritarian or nondemocratic societies? Can we export this American method without its original social and cultural conditions?

And what about observant participation born probably in France (Seger, 1972)? What are its embodied tacit assumptions? Probably a sort of voyeurism [with the Foucault's words: 'may also be called (voyeur) a spy, reporter, peeper, detective, psychoanalyst, sociologist, or anthropologist' (1980, p. 155); a strong idea of social control (as in the novel 1984 by George Orwell, as well as in the Panopticon, the idealistic prison designed by the English utilitarian philosopher Jeremy Bentham in 1791, social control was through the observation), a desire for domination over 'participants'. As Sudnow reminds us, ethnography is a very particular way of observing, belonging to a middle class' observer; the consequence is that ethnography is 'continually plagued by the import of such descriptive biases' (1967, p. 176). Young (2008, p. 180) rubs salt into the wound of the critique stating that 'many of the classic and most highly regarded studies of African Americans have been produced by White American or White European sociologists, in which one can see "the logic of White ethnographic gaze"'.

And what about the biographical method? Why was it born (probably) in Germany and not in another country? What does it embody of the German culture? The same may hold true for visual methods, as mentioned in the initial overview.

10. Glocalizing methodology?

Methodology and research methods need to be remodeled in order to meet and adapt to the new social situations. It is not still sustainable to continue to use mono-cultural research methods to inquire into multicultural or non-Western societies. Contemporary research methods, if they want to be useful and powerful as they were in the past, they need to rethink their cultural assumptions and renew their cultural apparatus. Methodology urges a reflexive perspective as Clifford and Marcus (1986) did with anthropology. This reflection aims to design research methods in relation to the cognitive and sociological constraints of the particular social situation under study.

We could try to adapt the methods to the new societies and to invent (using a socio-economic metaphor) a *glocalistic* methodology which takes into account the characteristics of local cultures. To glocalize is a good means to create products or services intended for the global market, but customized to suit the local culture. The term first appeared in the late 1980s in articles by Japanese economists in the Harvard Business Review. The sociologist Roland Robertson, who is credited with popularizing the term, states that glocalization describes the tempering effects of local conditions on global pressures. At a 1997 conference on 'Globalization and Indigenous Culture,' Robertson said that glocalization 'means the simultaneity – the co-presence – of both universalizing and particularizing tendencies.'

The relations between the global and the local: pros and cons

Does globalization lead to universal cultural uniformity, or does it leave room for particularism and cultural diversity? In the debate on the effects of globalization at least two opposite positions emerge: the homogeneity versus the heterogeneity theses (Ram, 2004). In the first one globalization acts 'one way' only, and the effects are a cultural uniformity (or homogeneity), the imperialism (Tomlinson, 1991), or McDonaldization (Ritzer, 1995) or saturation, which produce an Americanization of the various cultures.

The opposite view focuses more on localization and considers globalization as acting 'both ways,' producing cultural differences (or heterogeneity), the resilience of local cultures, creolization, hybridation, or indigenization or maturation (Bhabha, 1994; Hannerz, 2000), ingesting global flows and reshaping them in the digestion. For example, Appadurai (1996) asserts that it is impossible to think of the processes of cultural globalization in terms of a mechanical flow from center to periphery. And Hannerz (2000) estimates that the local domesticates the global – what he calls 'maturation.' Finally Robertson phrases the global–local encounter as 'the universalization of particularism and the particularization of universalism' (Robertson, 2000, p. 73).

Ram (2004, p. 23) suggests both perspectives are valid: the one-way approach is restricted to one level of social reality, the structural–institutional level; the two-way approach is restricted to the symbolic–expressive level of social reality. He advocates a combination, a global–local structural–symbolic model, proposing that globalization is a process that is simultaneously one-sided and two-sided but in two distinct societal levels. In order to explain it, Ram proposes the example of national flags:

> on the explicit level, each of the world's 186 national flags is unique in terms of its symbolic make-up (colors, tokens, etc.), a uniqueness that makes it so significant to

> the people it represents. But on an implicit level, all flags share the same code of "national flagness," so to speak: not only do they consist of a piece of colored cloth on a pole but, more importantly, they lend their followers a sense of common national identity. (2004, p. 24)

Glocalization: the McDonald's case

The concept of glocalization has been clearly adopted by McDonald's, which adapted the original menu to meet customer wants in different countries:

> McDonald's adapted the product because of religious laws and customs in a country. For example, in Israel, after initial protests, Big Macs are served without cheese in several outlets, thereby permitting the separation of meat and dairy products required of kosher restaurants. McDonald's restaurants in India serve Vegetable McNuggets and a mutton-based Maharaja Mac (Big Mac). Such innovations are necessary in a country where Hindus do not eat beef, Muslims do not eat pork, and Jains (among others) do not eat meat of any type. In Malaysia and Singapore, McDonald's underwent rigorous inspections by Muslim clerics to ensure ritual cleanliness; the chain was rewarded with a halal ("clean", "acceptable") certificate, indicating the total absence of pork products (. . .) In tropical markets, guava juice was added to the McDonald's menu. In Germany, beer is sold as well as McCroissants. Chilled yogurt drinks are available in Turkey, espresso and cold pasta in Italy. Teriyaki burgers are sold in Japan, vegetarian burgers in The Netherlands. McSpaghetti has become increasingly popular in the Philippines. McLaks (grilled salmon sandwich) are sold in Norway, McHuevo (poached egg hamburger) in Uruguay. In Thailand, McDonald's introduced the Samurai Pork Burger with sweet sauce. These are all examples of how McDonald's has adapted its product offer in international environments. (Vignali, 2001, p. 99)

This politics has been adopted also in advertising and promotional strategy, following the maxim 'brand globally, advertise locally' (Sandler & Shani, 1991). So McDonald's had a wide range of advertising campaigns in various countries, from the UK to France, passing through East Asia, China, and Hong Kong (see Vignali, 2001, pp. 104–106).

Ram has described the encounter (in 1993) between McDonald's, as the epitome of global fast food, and the local version of fast food, namely the falafel, 'fried chick-pea balls served in a "pocket" of pita bread with vegetable salad and tahini (sesame) sauce (. . .). The falafel, a Mediterranean delicacy of Egyptian origin, was adopted in Israel as its "national food"' (2004, p. 13) and become an Israeli tourist symbol, served as a national dish. However falafel fell from glory in the 1970s and 1980s, exactly when different types of fast foods came into existence, such as shawarma (lamb or turkey pieces on a spit), pizza, and the early hamburger stands (Ram, 2004, p. 13). What is more striking is that in the late 1990s the general McDonaldization of Israeli food habits, led to the falafel's renaissance, rather than to its demise. The falafel's comeback, vintage 2000, is available in two forms: gourmet and fast food. So we assisted to a change, producing a distinction between the old falafel and the new, postMcDonald's falafel.

As Ram (2004, p. 15) states, the interrelations of McDonald's and the falafel are not simply a contrast between local decline and global rise, because the global (McDonald's) contributed somewhat to the revival of the local (the falafel). The local, in turn, caused a slight modification in the taste and size of the global.

11. Think (methodologically) global and act (methodologically) local?

'Think global, act local' (Ohmae, 1989) has become a widespread expression. However, it is nonsense somehow. For two reasons: on one side thinking is always local, embodied in a specific context. Those who think reside in a specific place. As Haraway (1988) taught us, that there is no such thing as a 'god's eye view' and 'the view from nowhere [has become] a view from somewhere.' On the other side, on the contrary, there is nothing really local, indigenous. Each and every product that we usually define as local has always come from another place. Everything was imported in a determined historical moment: potatoes come from Perù, tomatoes from Central America, the vineyard (probably) from the Caucasus, apples from Central Asia, silk and peaches from China, and so on and so forth. All the things that we consider local today has, in reality, come from another place and been mixed up in here; nothing is really indigenous as we already saw for the falafel.

If we deem these assumptions reasonable, and that global *per se* does not exist because every global has a piece of local inside, then perhaps the word 'glocalizazion' is nonsense: there never is a get-together between a global and local; there is a get-together among two locals, two indigenous cultures that may understand and accept each other, in an intercultural dialog, or else the former prevails and colonizes the Other. In other words, we are now facing three situations:

(1) colonization (where a foreigner–local culture imposes itself on the resident–local one);
(2) localization (the isolation of a local);
(3) dialog and sometimes integration of two locals. We can tentatively call the last one 'inter-locality,' 'dialogicality,' or creolization.

From another perspective – obviously not part of the view we have outlined so far – transnational corporations are quick to take advantage of multiculturalism and postcolonialism, and they exploit genuine cultural concerns to their benefit. We have already seen this with McDonald's. The same thing happens with the Coca Cola company, putting more syrup into its drinks in the Middle East, for instance, because Arabic people have a sweet tooth. Or the Mattel company which manufactures the Barbie doll: the company decided to diversify the doll's wardrobe with various 'folk customs.' Barbie, who in 1959 began life as a slim, American blonde, in the 1980s became multiracial and multinational. Barbie dolls are sold in 140 countries (Varney, 1998, pp. 162, 164), some of which are supposed to embody in color and form, garments and accessories, the local (feminine) style.

These tales invite methodologists to think about the possibility of making culturally flexible a method in order to suit multicultural issues as education, race and ethnicity, gender, and so on. Not an impossible mission because many social researchers, active in so-called Developing Countries and sharing the action–research perspective, already constantly adapt their research methods to social situations and invent new techniques more appropriate to the context: e.g. collaborative drawing-based inquiry in Australia (Morgan, Mcinerney, Rumbold, & Liamputtong, 2009), interviewing in Argentina with cards printed with key research concepts related to the body (Sutton, 2011), Participatory Learning and Action techniques in South Africa (Vivienne Bozalek, in this issue), and so on. Other researchers have created new ways of sampling populations or discovering social patterns and cognitive schemas. Unfortunately these innovative methodological experiences are rarely published in methodological journals because these researchers are not academic and the time devoted to methodological reflection is marginalized.

12. Indigenous methodologies (IMs) and participatory action research (PAR): are they always an effective way out of methodological colonialism?

During the last decade, the awareness regarding the incompatibilities of mainstream research with indigenous cultures and the need to decolonize methodology has arisen with real intensity. From the pioneering work of Deloria (1969) and especially since the watershed publication of Tuhiwai Smith (1999), the frame of social justice methodology has been growing among researchers seeking to actively recognize the injustices of the past and present their research practices (Evans, Hole, Berg, Hutchinson, & Sookraj, 2009; Nicholls, 2009).

IMs and PAR have been presented as ways of overcoming methodological colonialism. Nonetheless, what is an indigenous research methodology? There are several answers that can be found in the existing literature, although not at all coinciding. If we create an unsatisfactory summary we could state that it is

> a research by and for indigenous peoples, using techniques and methods drawn from the traditions of those peoples. This set of approaches simply rejects research on indigenous communities that use exclusively positivistic, reductionist, and objectivist research rationales as irrelevant at best, colonialist most of the time. (Evans et al., 2009, p. 994)

IMs 'tend to approach cultural protocols, values and behaviours as an integral part of methodology' (Tuhiwai Smith, 1999, p. 15). This way

> researchers need to engage with reflexive evaluation of collective and negotiated design, data collection and data analysis to consider the interpersonal and collective dynamics during the research process, and any effects that the research may potentially have into the future. (Nicholls, 2009, p. 118).

This reflexivity acts on three layers (Chiu, 2006, p. 191; Nicholls, 2009, p. 121):

- self-reflexivity (or transparency);
- inter-personal reflexivity, because traditional modes of interviewing research subjects are in contrast with developing an 'authentic rapport' with research participants (Oakley, 2003);
- collective reflexivity and catalytic validity, to empathize very well with other people.

Researchers are expected to develop prevailing relationships with participants on the terms of the local community (Bishop, 2005, pp. 117, 129). IMs and PAR are overtly intended to provide alternatives to dominant positivistic paradigms, and both are intended to give voice and prominence to communities previously marginalized in research practices (Berg, Evans, Fuller, & the Okanagan Urban

Aboriginal Health Research Collective, 2007). This aims at community empowerment and individual empowerment, often viewed as an organizing principle for social change (Baistow, 1994) and 'relationality as methodology' (Nicholls, 2009, p. 120).

Much of the focus of this approach is about relationality and conduct, and distinguishes between the development of rapport with participants and the development of trust (Bishop, 2005, pp. 111, 112). 'Relationality in this context is ontology, epistemology and axiology' (Nicholls, 2009, p. 120). Heshusius (1994, p. 20) suggests 'describing ourselves and our work in ethical (and therefore participatory) terms', and Wilson (2001, p. 177) states: 'rather than asking about validity or reliability, you are asking how am I fulfilling my role in this relationship?' Nicholls (2009, p. 120) notes that 'Maori researchers have outlined an epistemology through Kaupapa Maori which explains the cultural expectations of relating to participants ethically and respectfully'.

Indigenous research techniques: what is new?

Once we accept these new epistemological and methodological assumptions, those who wish to discover new research techniques, shifting away from the existing toolbox, will sometimes turn out to be disappointed. For example, Blodgett, Schinke, Smith, Peltier, and Pheasant (2011) propose 'vignettes' as a method for presenting indigenous voices, forgetting that such method has been used in the 1928 by the American psychologist and therapist Rosenzweig (1945). It is enough to take a look at the list that, for example, Evans, Hole, Berg, Hutchinson, and Sookraj (2009, pp. 903, 904) make of the techniques they use:

(1) *informal conversations* between researchers and people;
(2) *talking circles* (in which the opportunity to speak is distributed sequentially around the circle/table and confrontational style argumentation is discouraged);
(3) *series of discussions* about the preliminary analysis via community meetings and focus groups;
(4) *detailed plans for reporting research results* and responding to feedback in the crafting of research reports. There is a methodological commitment to honour and highlight people's narratives and insights into the research focus and to make at least a subset of research products explicitly accessible (in terms of communication style) to all research participants;
(5) *interviews* with service providers;
(6) *a collective one-day workshop* held to summarize the views of service providers ... (and) undertaken using a modified form of the traditional Okanagan community research process called En'owkinwixw (see Armstrong, 2005 for a complete and appropriately authored description of the techniques) (...) In En'owkinwixw individuals work at various points in four separate groups containing likeminded individuals who then come back together as a whole to create an action-oriented consensus (...).

We could ask ourselves: what is indigenous in these IMs? Not much, in my opinion. With some exceptions, pointed out at the end of the previous section, most of the literature on IMs (a recent example is Denzin, Lincoln, and Tuhiwai Smith (2008), with an awful colonial picture in the cover) gives a lot of space to epistemological assumptions, but not very much to technical proposals, which should be really different from the dominant methods. At the most, there are suggestions and recommendations. What is specifically technical in the '4 Rs framework' (respect, relevance, reciprocity, and responsibility), of research with aboriginal communities, drawn from Kirkness and Barnhardt (1991)? A little. Too little. In the end IMs bring about little technical innovation, and remain at the periphery of methodology. Changing epistemology while sticking to the same method (albeit qualitative) does not help much. Also because we are not facing a scenario where we have, on one side, colonial methods (quantitative) and, on the other side, noncolonial ones (qualitative); 'coloniality' is embedded and embodied in both, as documented above. Moreover, it is important to make concrete and procedural proposals because the real match today is about technical and practical aspects; the epistemological aspects have already won: nobody would overtly defend the positivist and colonialist assumptions of methodology today. Changing epistemology and methods simultaneously is possible (or better, desirable), as many researchers show. It is the case of those who want to deracialize statistics from within statistics (Zuberi & Bonilla-Silva, 2008, p. 21) or else humanizing the survey proposing a 'conversational survey' (Gobo, 2006, 2011).

13. Concluding remarks

Contemporary social research methods are a product of *local* cultures. However, through the twentieth century the cultural frames embedded in these methods have been covered, and methodology from a locally based product became a sort of *general* knowledge based on context-free principles. This move made methodology one of the most globalized forms of knowledge.

However, it is largely recognized that traditional research methods often do not work adequately in the field anymore and the need of decolonizing contemporary methodology is no longer avoidable: multicultural societies are pressuring monocultural methods for a change, as well as non-Western ones. Consequently, the need for democratic and postcolonial methodologies working with multicultural and indigenous populations demands 'culturally flexible' contemporary research methods, to transform them in order to suit the new social conditions.

Ways for pursuing a 'glocalized,' creolized, or 'inter-localized' methodology are numerous and many more can be discovered and invented if methodologists and social researchers attune themselves to this issue.

One strategy could be to ask methodologists from Asia, Africa, Latin America to publish their experiences and reflections, and to demand that methodological journals search for papers by authors who do social research in Africa, Eastern, and Far Eastern countries in order to show the differences in interviewing in different cultures, in doing surveys or participant observation in different countries. As a scholar pointed out, 'there are several methods topics that developed faster in the non-Anglophone literature and it is frustrating that most of it remains unavailable to those who don't read the original language of publication' (Nigel Fielding, personal communication, 26 April 2009). This leads us to thematize the concern about how social research practice varies internationally, so as to move away from a purely Anglophone version of this tradition.

A *second* strategy could be to ask to methodologists to narrow down the universal claims of their textbooks and handbooks: reflexive chapters on the limits and cultural embeddedness of Western methods could open new epistemological perspectives.

A *third* strategy is to transform from *within* traditional research methods in a postcolonial perspective. Instead of simply refusing existing methods, it would be more interesting to change them from within, decolonizing them from the inside.

A *fourth* strategy is to make methodological journals really international, to produce really international handbooks of research methods in order to avoid ethnocentrism. What is 'international' needs to be problematized. There are at least four meanings (concepts) in the word 'international.' The first meaning classifies *international* as an event (or a book, a journal) well known in the world. However we can question: is Lady Diana's story a local or international event? A second meaning considers *international* to be an activity, a company (or book or journal) widespread in the world. But are Chinese restaurants representatives of a local or international cuisine? A third meaning connotes *international* as an institution ruled by, or a meeting (or a journal) participated in by people of different countries. Can we think that the G8 or the International Monetary Fund is international? The fourth meaning (my view) labels *international* as an institution, a book, a journal with an international perspective as ISA, UNO, UNESCO, and so on.

Will Western methodologists be available to rethink their methods? Will non-Western methodologists be able to invent new methods and re-design the existing ones instead of slavishly following traditional lessons? The making of glocalized or 'inter-localized' methodology depends upon their encounter.

Note

1. An early draft was presented at the Conference *The State of the Art of Qualitative Social Research in Europe*, organized by the Research Network "Qualitative Methods", European Sociological Association, Berlin, 9–10, September 2004.

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