



PART I

SOCIAL THEORY, GLOBALIZATION, AND EDUCATION

Introduction to Part I



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SETTING THE STAGE

“Globalization” has become one of the most recurrent concepts in social sciences. More often than not, however, the concept is handled without much of a properly articulated theory capable of explaining its historical origin and expansion. For education researchers attempting to elucidate how global changes and processes affect their field of study, this situation is problematic. When mobilized in the field of education, the notion seems to suffer from a persistent lack of conceptual clarity. It is often taken to mean a number of different things. For some it refers to the emergence of

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supranational institutions; others view its effects essentially through the development of international comparison and accountability; others understand it as an outcome of capitalist expansion; yet others associate it with the rise of the new technologies of communication or conceive of it merely as a discursive ideological construction meant to legitimate change.

While a comprehensive convergence of views on how to theorize this important notion might not be possible, or even desirable, the field would nevertheless benefit from an effort to clarify the main lines of demarcation of the debate. For all intents and purposes, what emerges now is a somewhat confusing situation where more and more references are made to a still rather elusive concept. Seemingly simple problems are not solved: Should we speak of “the globalization of education,” or is “globalization” a noneducational process that somehow affects education from the outside? Is “globalization” essentially an economic process? Is it a “cultural” process? The outcome of politics/policy? Or yet something else? How did it come about and evolve? Fundamentally, what theories of society do we have at our disposal to help make sense of it?

The ambition of Part I of this Handbook is to develop a firmer and tighter iterative dialogue between social theory, long concerned with theories of globalization, and education research. To a certain extent, education research and social theory have remained worlds apart, each busy with its own, seemingly specific, problem of reference. Attempts to bridge the gap between fundamental theories of globalization and the study of educational problems are still rare and often insufficiently sophisticated. The way the two fields of research relate to the notion of the nation state sheds some light on the gap between them: While social theorists have not always managed to account sufficiently clearly for the role of the nation state in globalization, or have even merely overlooked it, education research has, for its part, often emphasized the national level, to the point of finding itself trapped in “methodological nationalism” and subsequently failing to see education and education policy as global phenomena from the start.

Globalization studies in education have come to the forefront of the research agenda rather recently, following patterns of evolution in the 1990s in other disciplines such as political science and international relations (Held, 1997), anthropology (Appadurai, 1996), and sociology (Guillen, 2001). The notion that modern society had acquired a global or worldwide character has, however, a much longer history in the social sciences. Karl Marx’s work on capitalism was entirely dedicated to the study of the autonomization of “a system” capable of imposing and expanding its logic toward ever more objects and all over the world: “The need of a constantly expanding market for its products chases the bourgeoisie around over the whole surface of the globe. It must nestle everywhere, settle everywhere, establish connections everywhere” (Marx & Engels, 1848/1998, p. 243). Marx and Engels further emphasized that the “exploitation of the world market” had progressively “given a cosmopolitan character to production



and consumption in every country.” The notion of a world society that possesses not only a global economy (a world market) but also a number of other global systems (science, religion, politics, education, law . . .) is certainly not absent from the early days of sociology and the work of Weber, Simmel, or Tarde, for example.

From the 1970s, building on the foundational works of sociology, major theories of “world-level” culture (Meyer & Hannan, 1979), system (Wallerstein, 1974), or society (Luhmann, 1971) developed by analyzing globalization as the expansion of modern society’s principles of organization (i.e., normative integration and isomorphism; class divisions and conflict; functional differentiation and self-referentiality). Globalization, in each of these analytical perspectives, is conceived of as a progressive process with its own history. In the “world culture” perspective, the Renaissance and the humanistic orientation of monotheist religions gave birth to a culturally rationalized humanistic project of creating progress and justice; in the world system theory, it is the (self-) expansion of capitalism observable from the 15th century and its demands on other, noneconomic, domains of social life which created a world system; and in Luhmann’s systems theory, wars of religion and the invention of the printing press (which revealed the contingency of the world) triggered the gradual replacement of a stratified societal order by another order emphasizing functional differentiation. These three theories were chosen as entry points for this chapter because they offer, in our view, the most sophisticated accounts of modernity and globalization, and therefore allow an in-depth comparison between them. Of course, they do not cover the entire spectrum of existing theories of globalization. In order to nuance our main arguments, we therefore also refer, to some extent, to other complementary theoretical approaches.

These three theories have been variably influential in shaping the field of globalization studies in education. They are, however, rarely discussed comparatively from a paradigmatic perspective (with some exceptions; see, for instance, Burbules & Torres, 2000, or Popkewitz & Rivzi, 2009, for a discussion of globalization in education; or Holzer et al., 2015, for a broader comparison of world-culture theory with Luhmann’s systems theory). Our goal in Part I of this Handbook is therefore to take up the challenge and discuss the nature, forms, and drivers of globalization in education from these three distinct theoretical perspectives. Part I is organized in three sections, each dedicated to one pivotal paradigm. While each section inevitably puts forward some specific topics and problems, a number of themes are also dealt with across the sections in order to facilitate comparison and transversal reflection. Section I deals with cultural approaches of globalization in education, Section II is concerned with how more structural frameworks and political economy approach the problem; and Section III focuses on systems theory’s understanding of globalization and the globalization of education.

In this Introduction, we start by discussing comparatively the core principles underpinning the theories of (world) society involved in the three paradigms. Then, we



present how each theoretical orientation assesses the temporal evolution of globalization and identifies and explains its (problematic) consequences in late modernity before looking more specifically at how each conceives the place or function of education in its worldwide perspective. Finally, we delve into the way each strand conceptualizes the relations between education and policy, and we conclude by pointing to emerging debates and research avenues.

GLOBALIZATION THEORIES AS THEORIES OF (MODERN) SOCIETY

World culture (Meyer), world system (Wallerstein), and world society (Luhmann) theories, to name the main protagonists,¹ situate globalization in a long-term historical perspective as a corollary of modernity, but bring forth different answers to the questions of what makes social order possible in modernity, and what demarcates the modern period from preceding ones.

The world culture theory (WCT) situates the institutional origins of globalization in the cultural transformation of Europe at the end of the Middle Ages. Institutions, in this perspective, are “cultural rules giving collective meaning and value to particular entities and activities, integrating them into the larger schemes” (Meyer et al., 1987, p. 2), and not merely formal institutions (e.g., political, economic, or educational institutions or fields). WCT nurtures the ambition of explaining the structuration of modern society as a whole, by considering that all societal sectors (education, economy, polity, etc.) are embedded in a single process of cultural rationalization. Drawing on Weber’s analysis of Western rationalization, modernity and globalization are seen as historical processes through which society becomes progressively governed by culturally rationalized rules, and no longer by reference to the tradition (even if religions have strongly inspired the humanistic model of rationalization).² Both nature and the moral order (society) have become understandable, predictable, and thus manageable and governable. World society is filled with global models, transcendental principles devoted to defining possible collective and shared horizons. These models are education models (modern educational systems and the grammar of schooling, but not only), economic models defining how to govern a world-level economic exchange system, political ideals on the participation of actors in political decisions, but mainly cultural representations made possible by the rationalization and emergence of a shared model of rational actorhood. Rationalization operates as a grand cultural process producing institutionalized myths shaping the sectors of society. Even more importantly, the myth of actorhood assumes that the underlying social entities of the global world (individuals, organizations, and states) think of themselves as genuine actors with their own agency and a sense of identity. The



cognitive structures of society are located within actors, which, being entitled to autonomy and protection, become agentic. This cultural transformation of society relies on mechanisms of isomorphism: Social entities identify with the same set of norms, which facilitates their diffusion, even in the absence of direct contact between the entities in question. In this way, no society and no human groups, in the world society, can escape the education question, the environmental question, the question of participation in democracy, the question of the expansion of science, or the issue of human rights. Institutionalized conceptions of the organizations provide recipes for successful management; states subscribe to similar purposes and possess similar structures that make the circulation of public policies and institutional structures possible.

Wallerstein's world system theory takes a different entry in the analysis of modernity and globalization. It builds on a historical analysis of the development of modern capitalism as a world-historic mode of production. The distinctive feature of this mode of production (compared with preceding forms of economy), which emerges in Europe in the 15th century, stems from its ability to fuel its own expansion (see also the distinction between embedded and disembedded economy in Polanyi, 1944), that is, the accumulation of capital. In previous economic systems, the long and complex process of accumulation of capital was usually blocked, for reasons linked to morality or to the nonavailability of one or more elements of the accumulation process (e.g., accumulated value in the form of money, labor power, network of distributors, and consumers) (Wallerstein, 1983). The unification of a world market and the concomitant division of labor at the world level relied on extended commodification and produced a "capitalist civilization" by the penetration of the capitalist mode of production into other domains of social life. In his historical account of the modern world system, Wallerstein insistently underlined that the capitalist economy came into existence in Europe *before* all other modern institutions (education included). He understands such precedence as evidence of the primacy of the economy over other modern dynamics (Wallerstein, 1984, p. 29). As a forerunner, capitalism, it is argued, explains and actually motivates, or even demands, the subsequent development of modern institutions orchestrated by nation states. Nation states, in turn, became the most essential building blocks of the capitalist world system. Only (strong and sovereign) states can create and maintain the conditions necessary for establishing a global capitalist interstate system.

World system theory understands (national) societies as class societies and analogously describes the modern world as a stratified order of nations, a power hierarchy among states and other transnational organizations, in which exploitative dynamics between core and (semi)peripheral zones are continually at work. With its Marxist inspiration, world system theory contends that these dynamics of exploitation rely on, as much as they generate, ideological supports. It should therefore not come as a surprise that, next to their analysis of the material aspects of the world economy (i.e.,

their focus on how surplus value is created and distributed), world system scholars have grown increasingly interested in the analysis of the discourses, ideas, and policies that support capitalism and its dominating structures. They find that modern education emerged in the 19th century as a component of a broader “liberal program” promoted by the core countries (strong states) of the modern world system, to consolidate the emerging world order and their own functioning and favorable position within it. Note that the notion of a “strong state” designates well-functioning liberal states, as opposed to (former) colonies or dictatorships for example, which are considered weaker states (even when they may, on the face of it, seem more violent). While Wallerstein’s initial project does not aim to contribute to social theory *per se*,³ he thus nonetheless ends up with a theory of society where the emerging capitalist economy structures and relies on other sectors of society to perpetuate and expand itself.

Like all social theories, Luhmann’s theory of a global world society deals with the question of understanding how social order is possible. Its answer is: By means of differentiation. Order comes about by establishing and stabilizing differences, drawing lines, making distinctions, and in this way organizing communicative processes. Different societies differentiate themselves differently, distinguishing for example between “us” and “them,” superior and inferior, center and periphery, religion and science, and so on. The societies of our traditions relied on segmentary differentiation and, eventually, on hierarchical differentiation (stratification). Stratified societies were grounded on an external point of reference (God, nature) on which they could build their internal order: There was then “only one position from which to develop and circulate self-descriptions: the position of the center or of the hierarchical leaders, i.e., the position of the city or of the aristocracy” (Luhmann, 1988, p. 27).

For systems theory, globalization, or rather the emergence of world society, begins when another mode of differentiation—functional differentiation—surfaces and gradually replaces stratification. Functional differentiation has developed since the late Middle Ages but “was recognized as disruptive only in the second half of the 18th century” (Luhmann, 1997, p. 70). Luhmann published studies dedicated to the differentiation of a series of function systems: law, education, art, politics, science, the mass media, and so on. Often symbolized by the French Revolution, the more profound historical causes of the break away from older societal forms are to be found in the printing press and religious wars: Both played the same role of revealing the contingency of the world. With the resulting dissolution of a fixed and extra-societal point of reference capable of univocally ordering society (Clam, 2004, p. 247; Luhmann, 2013, p. 225) comes the progressive structural primacy of cognitive expectations (doubts) over normative expectation (certainties). The shared norms, which ensured the integration of premodern society, were thus progressively replaced by a “precarious order based on the institutionalization of learning.”



That society no longer depends on a hierarchical order (discriminating spaces and peoples) but on functional differences is a very foundational, and maybe the most important, statement that systems theory makes about modern society. Functional differentiation indeed comes with far-reaching consequences. One such consequence is the establishment of world society through multiple processes of globalization. Function systems know no physical boundaries: They do not contain a certain population, and they do not end at this or that spatial frontier (Luhmann 2008, p. 41). In their very principles (specificity and universality), they are therefore global from the start. Just as there is only one world economy (with all its internal and regional differences), there is today only one global scientific system (internally differentiated into disciplines, problems, theories, etc. and populated with many distinct organizations), one political system (differentiated into nation states most notably), one education system (with its own internal complexity and reliance on nation states), and so on. The (only) limit of such systems is the limit of their function. Function systems are, as a result of this limitation, not capable of grasping their environment comprehensively. All they can do—and this is how they form themselves—is to observe their environment very selectively, by relying on their own specific way of observing. Each system produces its limited, reductive, focused, necessarily partial version of the world (and in this way it produces itself). Modern society is therefore not capable of observing and knowing the world unequivocally. Instead, it produces, within itself, a series of diverse, multiple, incompatible descriptions of the world and of itself.

Thus, while world culture and world system theories explain the origin and expansion of globalization in relation to the primacy of a preponderant logic (culture or the economy), Luhmann's sociological systems theory starts from a different, opposite, premise: Not the predominance but instead the lack of any predominant logic, and the ensuing "heterarchy" of—specific yet universal—systems, fuels globalization processes. In this way, systems theory develops a theory of world society which contrasts with neoinstitutionalist and structuralist approaches: It does not start with imitation and isomorphism, nor with conflict and power, but rather with contingency and functional differentiation.

World culture, world system, and world society theories, while providing different accounts of the global character of modern society, nonetheless share important landmarks that differentiate them from the recent literature on globalization. First, they conceive of globalization as a long historical development triggered by the turn to modernity itself, and not as a recent development of a global arena beyond the frontiers of the nation states. Second, they put forward an analysis of the state as a global phenomenon, which means that they reject the conceptual opposition between the national and the global. In Wallerstein's world system theory, states are among the key components of the interstate dynamic supporting the development of world-level capitalism. In WCT, states, like organizations or individuals, are culturally rationalized actors, both enacting global models and scripting other actors (inter

alia other states) in the adoption of global models. In Luhmann's theory of a global world society, in which functional differentiation prevails, segmentation between nation states is but the internal mode of differentiation of the (global) political system. Thanks to this territorial anchorage, the political system could give rise to its most central organization, the nation state, and allow it to develop its function of making collectively binding decisions. Other differentiated systems, perhaps most notably the education system, profited from that national milieu (and from the state's organizing ability) to build their own global *modus operandi* (Mangez & Vanden Broeck, 2020).

THE (PROBLEMATIC) CONSEQUENCES OF GLOBALIZATION

Globalization is apprehended, in the three theoretical paradigms, as an *expansion*: ever-increased cultural rationalization in WCT; accrued accumulation of capital in the world system approach; and exacerbation of the self-centeredness of function systems in Luhmann's world society. The expansive dynamics pervading modernity do not come about without creating or accentuating a number of problems, which are symptomatic of the current era (populism, illiberalism, excessive inequalities, terrorism, etc.). The theories under scrutiny in this Handbook have not always accorded the same importance to these problems, nor are they equally equipped to explain them. With its seminal focus on diffusion and isomorphic processes, WCT has perhaps been less inclined to put much emphasis on conflicts and tensions. Some recent developments, however, now aim to integrate in the neoinstitutional framework the structuring of counter-reactions in the face of the hyperdevelopment of rationalization and liberalization. Attention to the problems that come with globalization is arguably more evident in the world system perspective where the disputed accumulation of capital has always been analyzed in relation to social movements, power struggles, and inequalities. Luhmann's systems theory of world society has, for its part, also given much attention to the problematic consequences of modernity, the heterarchy of function systems leading to the excessive, invasive, and uncoordinated expansion of increasingly self-referential logics.

In WCT, the principle of cultural rationalization spreading through all sectors of society suggests a rather harmonious conception of society. Globalization in WCT seems less associated with (growing) violence, conflicts, or societal fragmentation than in world system or world society approaches. Nonetheless, WCT has ever since its early development involved ideas of growing complexity, with the expansion of the world society entailing both the expansion of societal sectors and modern actors. Over time, the cultural rationalization of society turned modern actors into more and more complex entities, equipped with many instruments for developing their agency



and pressing others to develop theirs. Nation states have become more elaborate than they were a few decades ago: They have programs, ministries, and policies covering a much wider range of activities; organizations have built up more complex structures; individuals are also equipped with more elaborate self-knowledge instruments. Modern actors, organizations in particular, are also subject to multiple forms of decoupling (see Bromley & Powell, 2012): not only the (vertical) decoupling between institutional expectations and adaptation to local constraints (e.g., policy-practice gap) but also the (horizontal) decoupling between self-developing organizational equipment, and the core technology and objectives of the organization (e.g., means and ends gap). Societal sectors as well become more complex, crossed by multiple, often contradictory, institutional logics (see LeTendre, Chapter 7, this volume). The education sector, for instance, is growing without any real limitations, to instantiate modern principles of rationalization, freedom, and progress, with any domain being potentially subject to rationalization and teaching/learning (e.g., from entrepreneurship to environmental values) (see Lee & Ramirez, Chapter 1, this volume).

From the 1990s, the spread of organizations and increased individualization signaled a neoliberal turn (see Choi et al., Chapter 5, this volume), which also triggered new sorts of contestation opposing the very principle of cultural rationalization focused on the sacredness of individual choice, actorhood, and ideals of progress. Such “postliberal reactions” (see Furuta et al., Chapter 4, this volume) suggest a possible decline in the hegemony of the liberal order (or, in the language of institutionalism, the deinstitutionalization of the global liberal order). The decline of the liberal United States, the rising influence of the BRIC countries, the dramatic 2008 financial crisis, or the spread of liberal models into traditional arenas of social, communal, and family life together led to some contestations of the liberal/neoliberal order. These reactions involve challenges to some of the main cultural principles of modernity: the predominance of rationalization over tradition; the myth of actorhood; or the landmark values of progress, freedom, and human rights. They are mainly right-wing, but left-wing manifestations are observed as well. On the right, they involve a return to more traditional modes of integration and the reinforcement of collectives (e.g., religious, political-populist, familial), or the essentialization of individuals in friction with the myth of actorhood. And on the left, they bring forth contestations of the cultural, economic, and political institutions based on the tensions between ideals of progress and justice, and rising inequalities.

The world system approach has always associated capitalism with a number of problematic consequences, in particular its tendency to produce, and amplify, inequalities, both locally and globally. Depending on the period in history, these problems have been more or less contained, and legitimated. The world economy developed by drawing on the development of an interstate system of exchange and competition but also on political structures and administrations (involving welfare systems), and a geoculture (ideologies, science, social movements) transcending to a certain extent

the conflictual interests of capitalists and proletarians. As noted by post-Marxist authors, “capitalism is an economic system that always requires extra-economic embedding; its fundamental character means that it is unable to provide the necessary conditions of its continued expansion” (Dale, 2005, p. 121). In other words, the world economy established itself by subordinating polity and culture to its requirements (see the infrastructure-superstructure dialectic in Marx and Engels, or the embeddedness of the economy in Polanyi). However, the recent neoliberalization—that is, the ever-expanding uncontained capitalist logic—brings forth a series of exacerbated consequences, resulting from a deterioration of several mechanisms of legitimization and redistribution. First, it aggravated social inequalities and the polarization of wealth distribution (Piketty, 2021), especially in some regions of the world. In some others, domestic institutions (among others, education) rather keep individuals—at least some categories of them—from becoming losers in the process of globalization (see Blossfeld & Blossfeld, Chapter 13, this volume). Second, and relatedly, it renewed ideological resistance and reshaped social movements (e.g., right-wing populism) triggered by the socioeconomic and cultural marginality of those left behind by these processes of neoliberal globalization (Robertson & Nestore, 2021). Third, it also affects modern political and cultural institutions on which the economy is now more loosely relying, or rather drawing on in new ways. In the words of Colin Crouch (2004) about political institutions, “democracy in many advanced societies was being hollowed out, its big events becoming empty rituals as power passed increasingly to circles of wealthy business elites and an ever more isolated political class,” as a result of global financial deregulation and the weakening of class identities and struggles. Speaking of the institutions of industrial democracy, Baccaro and Howell (2017) describe a (neoliberal) dismantling of industrial relations⁴ revolving around the expansion of employer discretion in several strategic domains (wage determination, personnel management, work organization, and hiring and firing procedures). In the same vein, Jenny Ozga’s analysis (Chapter 9, this volume) of educational policy in the neoliberal age shows an usurpation of scientific expertise in the interest of international organizations creating international competition. In addition, many other authors (e.g., Giroux, 2018) link the development of the learner-centered approach or education focused on market-driven competitiveness to the neoliberalization of education and pedagogy (for other examples of critical analyses of neoliberalization in education, see Ball, 2003).

By emphasizing the heterarchical character of functional differentiation, Luhmann’s systems theory rejects all views attributing modernity’s specificity to any one ordering principle: To speak, for example, of modernity as neoliberal society, or alternatively to characterize it by an all-encompassing process of rationalization and standardization, is a claim whose flaw, according to Luhmann, is to oversimplify and thus misunderstand modernity by reducing it to only one of its facets (Luhmann, 1995, pp. 464–465). In contrast to most social theorists, Luhmann associates functional



differentiation with the lack of any primary ordering principle and emphasizes the problematic consequences that ensue from such an absence. Among the many problematic consequences of functional differentiation, the best known “is certainly the failure of the world economic system to cope with the problem of the just distribution of wealth,” but, Luhmann adds, “[s]imilar problems can be cited for other functional systems” (Luhmann 2013, p. 124). In the absence of any prevailing ordering principle, systems do not complement one another so as to establish a coherent whole (as Talcott Parsons would have it), nor do they converge to ensure the reproduction of capital (as Marxism might assume). Instead, each system recklessly assumes the primacy of its own function and tends to expand its reach and invade its surroundings.

Function systems exhibit a built-in expansive logic. When society renounced establishing its internal order on an external ground (nature and God), it condemned itself to self-reference. Whatever is, then, can no longer remain stable or solid for long; new possibilities can now constantly be thematized: Why this, why not that instead? “What (. . .) if we set out to observe the natural as artificial and the necessary as contingent?” (Luhmann, 2002, p. 90). The question operates as the leitmotiv of modernity. It can and will be applied to ever more aspects of modern life. Modernity thus presents us with a “cosmology of contingency” (Luhmann, 2005, p. 39): How can one know what to do, what to believe, what to think? Uncertainties proliferate as regards the future and the decisions to be made globally. Individuals, organizations, and systems all seem to experience an acceleration of the pace of time (Rosa, 2013). Faced with this specific mode of experiencing the future, which Luhmann (1976) refers to as the “futurization of the future,” different functional systems (law, economy, politics, education, science, etc.) can react in different ways (on this topic, see also Mangez & Vanden Broeck, 2020). Understanding how such systems internalize “future emergencies” (Opitz & Tellman, 2015) has become a central concern for a number of systems theorists. One first possible answer to this question consists in considering future uncertainties as a resource (Esposito, 2015) for the expansion of each system, rather than as an obstacle to its operations: Uncertainties then lead to ever more policy, ever more science, ever more economic operations, ever more art, more laws, and so on, thus endlessly feeding a global process of systemic expansion. In the realm of education, too, questions have been asked which have contributed to expanding the system: Why only teach and learn between the ages of 5 or 6 and 16 or 18? Why not earlier, later, or even throughout life? Why only learn in schools and universities? Why not include nonformal, real-life situations within learning processes? Why not teach citizenship, entrepreneurship, or coding? Why not learn how to learn? A substantial acceleration of the evolution process is rendered possible by the thematization of possible variations (see Luhmann, 1990, p. 67). As argued elsewhere, it enables education’s global expansion in all directions: in its temporal dimension, as life-long learning; in its social dimension, as mass schooling; and in its material dimension, as the “educationalization” of all facets of life (Mangez & Vanden Broeck, 2021;



Vanden Broeck, 2020). There seems no longer to be any legitimate limit to the list of possibilities with regard to who, what, or when to educate. Expansive dynamics are at work in various systems simultaneously (and this means: without coordination). The result of such multiple, uncoordinated, dynamics “will reinforce unpredictability (. . .) and bring about a higher degree of uncertainty with respect to the future” (Luhmann, 1990, p. 184). Systems theory portrays modern society’s future as a series of imbalances among expansive, invasive, self-centered logics.

None of the three paradigms under examination considers the problematic consequences and reactions to hypermodernity or late modernity as obstructions to globalization. In WCT, modern myths of the liberal order indeed cohabit with postliberal reactions making the world culturally more complex. The world system theory, for its part, has always pointed to the adaptive capacities of capitalism in the face of social movements or restructured economic parameters (i.e., green capitalism as an adaptation to the consumer market and the scarcity of natural resources). Social movements, global or national, have hardly constrained capitalist development in history, but the recent economic and health crises suggest some possible resurgence of modern institutions (democracy, redistributive social policies, etc.) limiting the consequences of expanding capitalism (Crouch, 2020). Finally, Luhmann’s system theory has from its early development integrated ideas of improbability, instability, and violence, and rather sees the global expansion of self-centered systems as a source of increased complexity giving rise to a society constantly on the edge of chaos.

MODERN FORMS OF EDUCATION AND BEYOND

The three theories under discussion in this Handbook view education as part and parcel of the complex set of social and institutional domains that emerged along with (early modern) nation-state society and eventually evolved in relation to the ensuing (late modern) transformations of nation states themselves. Theories differ, however, in their analysis of the role or function of education in this increasingly global context. In the cultural approach, education seems to stand both as an outcome of, and a means for, the diffusion of rationalization. World system theory develops a more conflictual perspective on capitalism in which education seems to operate as an instrument supporting broader local and global processes of domination and legitimation. Systems theory, for its part, prefers to characterize education as an autopoietic system capable of adapting to its changing environment and also of parasitizing and coupling itself with strategic allies like the nation state. In this section, we look at the place given to modern education by each of the three core theories and we further



reflect on how they interpret recent evolutions in education, notably the new global emphasis on learning.

The different strands of cultural or institutional theorizations have not all given the same importance to modern education and its school form. In WCT, modern education, even if mainly organized by nation states, is seen as a global product, universal and universalistic in aspiration (Meyer & Ramirez, 2000). Nation states are themselves a global construct embedded in world society. Education and schools more particularly operate as a vehicle for the rationalization of the world and the acculturation of individuals. The idea of a “schooled society” (Baker, 2014) indicates that society is increasingly created and defined by education. The dramatic expansion of education should be regarded as responding to the need for modern societies to incorporate and locate within actors the principle of the modern world society. Education is thus a core and causal part of the cultural model of the modern society or nation state.

With globalization, education models are increasingly diffused from international organizations. Nonetheless, the institutional dynamic of diffusion and standardization of modern education remains fundamentally linked to the spread of the world culture and isomorphism. The expansion and standardization of education cover educational structures (e.g., mandatory schooling and nonselective school structures), content (e.g., civics education) and instruction (e.g., active learner), and the organization of educational work and education organizations. The recent phase of educational expansion relies more strongly on the expansion of organizations (see Choi et al., Chapter 5, this volume), which profoundly alters education. The most dramatic worldwide changes in education, such as privatization, the rise of testing, and the emergence of multi-stakeholder governance regimes that run from local to global levels, are better understood as part of an organizational transformation of schooling and society than by any interpretations in terms of the (interest-based, economy-defined) neoliberalization of society. In other words, in the world culture perspective, the expansion of education and the growth of organizations have the same root, that is, cultural rationalization. In particular, curricula put increased emphasis on organizations (of different kinds, not only international organizations) and participation of individuals in the organizational society, which may explain the expansion of 21st-century skills (critical thinking, problem-solving, entrepreneurial thinking, etc.) and pedagogies such as project-based learning.

In addition to the spread of organizations, the decline in liberal hegemony outlined earlier weakens the centrality of common forms of education inspired by principles of universality. It then furthers the rise of alternative and oppositional models of society and redirects education toward less liberal-individualist forms, which is now a central concern for world culture theorists. This is how WCT, in its most recent developments, interprets the growing success of homeschooling (specifically in the United States, but not only) or the resurgence of identity-based, religious or politically oriented sorts of education. These are part of a broader movement of contestation of

cultural institutions, precisely those in charge of reproducing and legitimating the global cultural order.

With the exception of these more recent developments, the cultural approaches to the role of education in our global, modern society do not put much emphasis on conflicts and inequalities in their analysis.⁵ The opposite could be said of the second group of theories to which we now turn. For world system scholars and other structuralists or poststructuralists, the function of formal education, or that of the more diffused notion of “learning,” can indeed not be detached from an analysis of power mechanisms and an examination of the economy and the state. Strong states (need to) protect and educate their citizens, first to make “dangerous classes” less dangerous but then also to establish a market of consumers and to have “those with ‘merit’ (. . .) play the key roles in political, economic, and social institutions” (Wallerstein, 2004, p. 52). Together with other social or health policies, education establishes the conditions for strong states to function and perform within a liberal modern stratified social order.

Not unlike class sociologists who view education as an indirect and subtle, even hidden, means for the reproduction and legitimation of class structure within national societies, those walking in Wallerstein’s footsteps attribute a similar function to the programs of educational assistance that organizations (the World Bank, typically) and strong states from the core zone of the world system grant to those situated on the periphery. Such programs, whether or not they are perceived as instruments of domination by their addressees, are analyzed as direct or indirect means ensuring the maintenance and even the expansion of the capitalist world economy (Clayton, 1998). Almost half a century ago, Philip G. Altbach (1977) used the notion of “neo-colonialism” to describe American foreign aid programs and spoke then of “a servitude of the mind” to characterize the educational effects of such programs. This line of analysis has been pursued and nuanced since then (Robertson, 2005). Research on policy transfer showed that pressure on weak states to adapt and adopt “international standards” in education does not lead to a global convergence of systems, but rather generates hybrid forms (Schriewer, 2016; Steiner-Khamsi, 2004). It is important to notice that the power dynamics at work at this global interstate level constantly interact with the more local or national class struggles. In the weak states in particular, fractions of local elites may benefit from allying with powerful interests outside the country.

Whether within nation states or at a more global interstate level, education, it is claimed, operates as an instrument of legitimation (next to and embedded with other such instruments) and as a condition for the dynamic reproduction of a constantly evolving global social order. In a somewhat similar vein, several scholars (see Ozga, Chapter 9, this volume) consider today’s knowledge-based economy capable of shaping, or even instrumentalizing, a number of subordinated and interdependent (equally global) processes, whether they be educational, political, or even legal. Of



all such subordinated systems, education often appears the least autonomous in the eyes of these analysts: It merely follows the economy and responds to its needs. And now that the new knowledge economy has turned knowledge itself into a key component, or even raw material, for its operations, education in a sense slavishly aligns with the demands of this economy for an accrued emphasis on learning, learning to learn, solving problems and other similar qualities expected from “knowledge workers.” These analysts thus see education as responding to the needs of the economy in the same way as Wallerstein when he analyzed how science (by rationalizing the world and institutionalizing the principle of universality), the polity (by guaranteeing stability and developing the interstate system), or education (by generating ideational support) has been instrumental in the development of world-level capitalism.

The new emphasis on learning has also attracted the attention of a number of researchers inspired by the work of Michel Foucault (see Ball, 2013). Their perspective, it must be recognized, is different from that outlined earlier.⁶ At the center of the Foucauldian tradition, one finds the notion of the “apparatus” (*dispositif*). An apparatus operates as a solution to a problem, that of conducting the conduct of individuals, but, and this is important, as a solution without an author. It designates the very diffuse, ubiquitous, unavoidable presence of power in the social world. It is less about power mechanisms at work between identifiable groups or logics than about society exercising power on itself. Maarten Simons (Chapter 10, this volume) links Europeanization and globalization with the progressive replacement of the “social apparatus” by the “learning apparatus.” Lifelong learning is becoming an apparatus through which individuals learn to govern themselves and conduct their lives by constantly investing in their own learning.

Like the branches of social theory discussed earlier, systems theory acknowledges education as a latecomer among the various function systems that have differentiated themselves in the course of the long transition to modernity. The differentiation of a system for education indeed started after most other function systems had begun their own differentiation (see Vanderstraeten, Chapter 16, this volume). Only when the process of functional differentiation had rendered modern society more complex was the need for an education system deemed necessary. According to systems theory, however, no conclusion can be drawn from this delay with regard to the status of education, as compared with other systems. That it came after several other developments does not make it a product of, or a simple support system for, say, the economy or politics, or any other logics. Systems theory thus diverges both from neoinstitutionalism(s) and from the more power-centered approaches outlined earlier. Education is not merely a channel for a broader process of rationalization; nor is it a stratagem for establishing and legitimating power relations locally and globally.

Instead, systems theory understands education as a global system with a life of its own. It is a specific form of communication, which emerged in response to increased complexity and which became capable of perpetuating itself. In order to avoid any

misunderstanding, the problem of the relationship between education and politics deserves some development. Perhaps surprisingly Luhmann argues that education has a life of its own but simultaneously acknowledges that it lacks the technology to achieve its task on its own. The contradiction is only apparent. In contrast with several other systems such as the economy or science, education does not possess a genuine generalized symbolic medium to increase the probability of its success. Luhmann and Schorr (1979, 2000) speak of a technological deficit to emphasize the insurmountable difference between education as a social system (communication) and the learners' psychic systems (consciousness) which it hopes to change. In an attempt to overcome its limit, education relies on the organization of lengthy interactions between teachers and students (on this topic, see Vanden Broeck, 2020). Their co-presence in the classroom during extended periods of time is supposed to help education reach its unattainable target. But, for these interactions to even take place, an organization is needed: There must be schools and teachers, a precise yearly calendar and daily timetable, a population of pupils and students actually attending schools on a regular basis and divided into distinct age groups, and so on. All such requirements do not and cannot result from an operation of the education system itself. For all this, education has had to rely on the political system and the decision-making ability of the state. Such dependence should not be equated with a lack of autonomy. Education needs the state to ensure its organization in schools and classrooms, but the interaction order thus rendered possible then acquires a life of its own. Education operates a bit like a parasite that uses another system's organizing ability as a support on which to perform its own operations. While his sociology thus describes education as a system which found in the state the perfect host to ensure its organization, Luhmann himself did not really explore much whether and how education could make use of other such supports. The task has hardly been taken up by other scholars with the exception of Pieter Vanden Broeck (2021), who has examined education's reliance on the European Union, a transnational organization that lacks the means of the nation state, and documented the resulting emergence of a new educational form that no longer resembles the school and its classrooms.

In their more detailed analysis of modern education, Luhmann and Schorr (2000, p. 70) distinguish stages in the evolution of the system. Education, they argue, organized itself successively around different "contingency formulas" (see Weinbach, Chapter 19, this volume). In the early 1980s already, they found that education increasingly relied on what they labeled the "learning to learn formula." With the notion of "learning," they argued, education achieves self-referentiality: It now possesses a specific formula, independent from (any other system in) its environment, and which can be applied universally to any item or topic in this environment. It is crucial to understand that, for systems theory, the turn to learning is an accomplishment of the education system itself. While Luhmann and Schorr (2000) acknowledge that "with the quickly increasing differentiation, specialization, and fluctuation of work



requirements,” the learning formula is probably more relevant for the economy, they maintain that its emergence cannot be attributed to demands from the economy but must be understood as the result of a reflective process of the education system itself. The contrast with the world system perspective could hardly be sharper.

EDUCATION AND POLICY

The three main lines of theorization under scrutiny in the first part of this Handbook hold different views on the relations between education and politics.

The policy dimension is arguably not predominant in WCT (see Maroy & Pons, Chapter 6, this volume). Cultural rationalization involves in the foreground institutions of rationalization (e.g., science) and acculturation (e.g., education);⁷ or rather, education, science, and polity are all embedded in the world culture. In this perspective, the nation state itself is a product of globalization and a vehicle for diffusing models across the globe (Meyer, 1980). In addition to nation states, a constellation of international actors (not really conceptualized as a field in WCT) act as rationalized others while increasing the institutional value and the diffusion of global models. The recognition of several types of interdependencies (political with the issue of world conflict and peace; economic with the issue of the governability of the world-level economic exchange system; and cultural with the issue of migration for instance) has led to the creation and expansion of several types of international organizations (political nongovernmental associations, and professional and scientific organizations) forming a “world polity” (Meyer et al., 1997). In scriptwriting the world, these organizations are confronted with difficulties and problems that indicate the path through which they develop the global models. Due to the absence of a real possibility for authoritative resolutions, they have to diffuse their idealized models through soft law. And their narratives are anchored in the dominance of collective and nonconflictual ideas. These characteristics indicate the peculiar nature of the world polity: It involves limited power relations and competition among states given the actors’ common identity; and in the same way, limited constraints or coercive power. Power is therefore not evacuated but limited by the injunction on states to behave according to shared norms and structures.

Consequently, states, like other actors (individuals, organizations), tend to grow more structured and elaborated with time. They develop ever more ministries, policies, programs, regulations, and instruments of every kind in search of legitimacy, thus expanding the policy sector in the same way as an expansion of education has been observed by WCT. However, polity is also decoupled in many ways. Global models are decoupled from the real activity of states because “nation states are modeled on an external culture that cannot simply be imported wholesale as a fully

functioning system” (Meyer et al., 1997, p. 154), and policies on the national scene are most often decoupled from the real practices in societal sectors (i.e., education). If coherence or standardization is observed (among organizations in the same sector, or among sectors of society), it is not much due to policy structuration or coupling effects. Rather, it results from similar patterns of rationalization rooted in the world culture that make policy systems like education or science look similar from one place to another.

As outlined earlier, the world system literature also gives a central place to states. However, their role is of a different nature than in WCT. States put in place the necessary conditions for the development of capitalism (Dale, 2005). Strong states manage to implement a number of policies that strengthen their position (e.g., by educating their citizens or adapting the workforce). They may even manage to educate workers of weak states in a way that corresponds to their interests. The analysis is directed in parallel toward the unequal distribution of surplus value and toward the ideas, discourses, and policies that support its expansion. Education is seen as an instrument in the hands of politics and the economy that permits their reproduction and development. The more recent evolutions in the field have drawn attention to the elaboration of a neoliberal discourse and the implementation of neoliberal policies across the globe. In education, for instance, neoliberalism relies essentially on a simple rationale. First comes the critique of the system: Schools, teachers, and students do not perform well enough, inequalities are growing, and the system is not working. Next comes scapegoating: Public education is bureaucratic, personnel have linear and secure careers, and pedagogy is inefficient. One of the key, and most contested, arguments of neoliberalism consists in presenting social problems (poverty, inequality, and unemployment) as resulting from a lack or mismatch of skills and competencies. Neoliberalism (in education) then consists essentially in promoting a number of remedies variably developed from one context to another: school choice policy, privatization, intensive testing (assessing students, schools, and national systems), and rewards and incentives for schools and teachers.

In the same way, policy is often analyzed as subordinated to expanding economic interests (see Crouch, 2004). This subordination, it is argued, diverts democratic institutions from their task of representing and debating the common goods in favor of lobbies and business interests. Policy actors are then marginalized or suspected of acting in the service of capitalist development. Foucauldian analysts, as presented in this volume by Maarten Simons (Chapter 10), even if they make a very different argument on the nature of modern forms of power, join critical analyses of democracy (in the neoliberal age) by not locating power in the hands of policy actors. Power, then, is not the prerogative of formal policy circles. Instead, it is a diffuse process through which individuals are led to govern themselves by learning, made thus responsible for solving themselves different sets of individual problems (e.g., unemployment) and societal problems (e.g., social exclusion). Making individuals responsible for their



own learning thus takes the place of social policies in bridging ideals of freedom and security.

According to systems theory, the very notion of reforming, or that of policymaking, only acquired its current meaning with the turn to modernity (see Corsi, Chapter 17, this volume). It relies on the modern and nowadays global assumptions that the future will differ from the past and that it is possible to act upon it in the present. That these assumptions are solidly anchored in today's world society does not make them unproblematic (Vanderstraeten, 1997). In Luhmann's recently translated book *Organization and Decision* (2019, pp. 273–298), one finds a chapter entitled “Structural Change: The Poetry of Reform and the Reality of Evolution.” The opposition conveyed by the title of the chapter subsumes systems theory's view on the problem of reforming or policymaking: Reality never obeys even the best of intentions to reform it, but results instead from a nongovernable, nonpredictable process of becoming, which Luhmann refers to here under the notion of evolution. To grasp the argument, one must acknowledge that any reform, any political attempt to steer a system, necessarily involves two strands of operations: “one has to distinguish the operation of steering, which produces its own effects, from the operation of observing this operation, which produces for its own part its own effects” (Luhmann, 1997, p. 45). These intertwined interventions by the reforming system and by the system it addresses trigger “strange loops.” The mere attempt to steer the world, simply by virtue of being visible to that world, tends to produce effects that cannot be steered: “steering always creates an additional effect by being observed and by the reactions of the observer in the one or the other way” (1997, p. 49). This should not be taken to mean that reforms are pointless and make no difference in the world. It rather implies that they lack control over their own effects. It is therefore unlikely that reforms merely meet their target: As is particularly obvious in the domain of education, reforms regularly fail, their effects are often moderate, uncertain, multiple, sometimes contradictory, regularly unexpected, and even counterproductive. Reforming then can never end; it constantly produces reasons to start reforming anew. But, as Luhmann warns, more steering will only lead to “more (and more rapid) unintentional evolution” (Luhmann, 1982, p. 134).

DISCUSSION AND CONCLUSION

The first part of this Handbook discusses three ways in which social theory attempts to describe and explain the emergence of a single worldwide social reality. The three theoretical orientations under scrutiny differ in many respects but converge on one fundamental idea: The world we live in has been global for quite some time. Pointing to the exact beginnings is not easy, but all agree that the turn toward a global society can be linked to the emergence of modernity itself. Many notions that too hasty analysts

associate with the nation state and oppose to globalization are in fact global from the start. The very idea of a nation—and that of a nation state—are global ideas. The grammar of schooling is another typical example of a global form (which explains why we immediately recognize a school as a school no matter where we travel in the world, and no matter how different it may appear from the schools we are most familiar with at home). Even where schools are lacking, the notion of a grammar of schooling is present and imposes itself, making their absence noticeable and even problematic.

Curiously, however, this observation has not always been noticed. In the eyes of many, our modern global society has long taken the appearance of “a series of national societies.” The concept of globalization itself only gained broad, and indeed global, attention in the 1980s and has since then often been associated with some sort of ubiquitous threat. Apparently, society became increasingly sensitive to its global character long after the turn to modernity. The fact that globalization is now met with much ambivalence cannot be overlooked: It needs itself to be understood as an evolution in the process of globalization.

While the ambivalence associated with the notion of globalization has become more intense in the last decades, it also resonates with concerns that had been expressed much earlier. Marx and Engels had long underlined the lack of a stable ground resulting from capitalism’s constant orientation toward change. Weber was even more concerned than Marx with the global movement of modernity. For him, clearly, the uninterrupted preoccupation with the pursuit of order would inevitably come with a darker side filled with insecurities, unexpected consequences, and multiple alienations. The disappearance of shared norms haunted Durkheim’s perspective on the future of modernity.

In view of the many global crises that we experience, one could argue that the problematic consequences that these founding figures had sensed long ago have remained with us and even worsened. The theoretical orientations that we have been discussing indeed all describe globalization as an ambivalent, double-edged, evolving process. Each perspective acknowledges, though with more or less emphasis, that globalization carries with it a series of problematic consequences. These take the form of an epistemological crisis of modern rationality, values, and institutions in the recent development of WCT; the form of aggravated inequalities feeding resentment and distrust in democratic institutions in the world system perspective; and the form of increased uncertainty and the social exclusion of persons by uncoordinated expansive systemic logics in Luhmann’s systems theory.

Different lines of research have emerged as attempts to better grasp these changes. The evolving role of the state has notably attracted the attention of several authors. Is the state still capable of containing the consequences of capitalism and does it contribute to reinventing new sorts of solidarities (Thelen, 2014)? What roles should modern educational systems and other kinds of learning play? Is the historical model of political constitution (of the nation state) relevant for inspiring world-level civil



constitutions, and renewed couplings of politics and law at multiple levels (Teubner, 2004)? Are there any other means than law to limit the expansive dynamic of differentiated systems? What theories of global justice can be proposed in a politically and economically ever more interconnected world, taking into account the rising importance of commons (Risse, 2012, p. x), specifically in the face of the climate change crisis? How can educational policies and systems contribute to renewed dynamics of citizenship and democracy (Torres, 2002)? Still others are looking at the increased role of organizations or between-organization dynamics in globalization (e.g., Choi et al., Chapter 5, this volume). Should these dynamics be seen as complements or competitors to modern institutions? More broadly, do they signal transformations in the fundamental characteristics of (global) organizations and institutions towards more reflexive but also more contested institutions (Zürn, 2018)?

Part I of this Handbook is intended as an invitation to amplify these emerging debates while simultaneously anchoring them in the evolution of social theories of modernity and globalization. At a time when globalization increasingly elicits emotional logics of fear and hope, in academia as well, this collection of chapters strongly encourages researchers to reinforce theoretical developments that capture fundamental mechanisms at work and so make sense of the seemingly troubled times of globalization.

NOTES

1. Cultural analyses of globalization represented in the first section of this Handbook, for instance, include a significant diversity of theoretical approaches ranging from cultural anthropology (see Anderson-Levitt, Chapter 2, this volume) to different strands of new-institutionalism, in particular the sociological and historical new institutionalisms (see Graf, Chapter 3, this volume). In this text, however, we mainly refer to the world culture theory (WCT) as an exemplification of the cultural analyses of globalization to avoid overcomplexity and allow for comparison of theoretical paradigms. In the same spirit, we mainly draw on Wallerstein's world system theory to cover analyses of globalization from a perspective of domination, materialism, and inequalities, but theoretical approaches of this kind are much broader, including post-Marxism, political economy, social philosophy, field theories, and comparative policy (see this Handbook, Section II). Section III, with its focus on Niklas Luhmann's systems theory and its recent developments, is more homogeneous.
2. For a critical discussion on the Weberian heritage of Meyer, see Carney et al. (2012), or a critical appraisal of the historical interpretation proposed by WCT, see Tröhler (2009).
3. The main field of study of Wallerstein is history or rather "socio-history" (see Braudel, 1958). His history of capitalism is inspired by Marx, but he does not embed his historical analysis in the broader sociological theory of historical materialism, class divisions, and infrastructure/superstructure dialectic, as Marx and Engels do, for example.
4. In the political-economy scholarship in historical institutionalism, the thesis of a neoliberalization of the economy and, beyond it, society, is disputed by alternative explanations focusing on the multiple trajectories of liberalization (Thelen, 2014).

5. One should note that in some strands of cultural anthropology, nevertheless, authors such as Jonathan Friedman (2007) precisely argue that analyses of globalization in terms of institutional arrangements or cultural meanings cannot be properly addressed without being integrated into the structural (Marxist) framework of reproduction.
6. Interestingly, Foucauldian analyses share some points with WCT. In WCT, the cultural rules of modernity involve the idea of a self-governing actor. In other words, the myth of actorhood implies self-governmentality. However, the two perspectives differ in the status given to power issues, much more central for Foucault than for WC theorists.
7. For David Kamens (1988), the development of political systems in nations, and the way popular participation in politics within democratic systems is organized, precisely results from educational expansion.

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