EMERGING FORMS OF GLOBALIZATION DIALECTICS: “INTERLOCALIZATION,” A NEW PRAXIS OF POWER AND CULTURE IN COMMERCIAL MEDIA AND DEVELOPMENT COMMUNICATION

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ABSTRACT

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This critical research seeks to better understand the hegemonic process of globalization. Due to power differences, globalization results in differential advantage and disadvantage for the involved cultures. The dialectical criticism of globalization aims to monitor social injustice and advances concepts on media homogenization, uneven information flow, and cultural imperialism. This interdisciplinary study explores the practices of globalization that are less culturally biased. Particularly, it makes a first intent to conceptualize a new globalization form, “interlocalization.” Premised upon a competitive and free market system, the study explores the ways “interlocalization” might offer a more equitable relationship for the players of different cultures. Some “interlocalization” practices are also elaborated through two critical case studies. While studying forms of commercial minority media, the first case study examines the implications of “interlocalization” in the media expansion of a Catalan communication firm, Grupo Planeta. Based on the Roma projects of the Open Society Institute in Europe, the second case study presents a research on the role of “interlocalization” in social change. Analyzing cross-cultural participatory communication, this second study explores the use of “interlocalization” as tool in the creation of global practices for sustainable development. The overarching goal for this research is the advancement of equity and justice in media and development communication practices globally.
I am grateful to my Dad who taught me the value of studying and learning, and in memoriam to my Mom, who encouraged me to achieve a Ph.D.
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INTRODUCTION

“Globalization? The Arab sheikh and an American diplomat can hang around in a pub in New Delhi that serves Lebanese cuisine to the music of a Filipino band in rooms decorated with barrel of Irish stout, a stuffed Hippo head, and a vintage poster announcing the Grand Ole Opry concert to be given at the high school in Douglas, Georgia” (Professor Asfar Hussain, E-mail communication, April 6, 2006).

According to sociocultural communication theories, social reality is “constructed through a process of interaction in groups, communities, and cultures” (Littlejohn & Foss, 2005, p. 44). People construct social meaning, and what is called “culture” gives the framework for this shared meaning. Culture is not an easy concept to define. Different social scientific disciplines such as sociology, psychology, culture studies, communication, and even economics and business studies attempt to explain what is meant by the word “culture.” According to Geertz (1973), culture is “a historically transmitted pattern of meanings...embodied in symbols, a system of inherited conceptions expressed in symbolic forms by means of which men communicate, perpetuate and develop their knowledge about and attitudes toward life” (p. 89). Thus, culture should be understood dialectically as static and fluid, product and process, tradition and change; as socially constructed and continuously reiterated process.

Our culture membership is expressed through communication. During the 20th century, the cross-border expansion of companies created new levels of communication and culture interconnectedness that affects membership of nations and local cultures as well. Profit-orientated free market systems gain space around the world (Appelbaum, & Robinson, 2005). While crossing national boundaries and cultures, transnational corporations seek to increase the number of consumers in order to maximize profit and gain market share (Green, 1990). Even socio-economic or healthcare development projects are tainted by the interest of these large
conglomerates. Thus, this global inter-relatedness of firms, nations, and cultures calls for new adaptations in a fast-changing world.

Although digital media provides space and allows the creation of new culture sites, it is mostly the large media corporations that change cultures around the world. Converged to large media empires (Wirth, 2005; Chan-Olmsted, 2006), a few strong oligopolies such as Disney, News Corporation, BBC, Vivendi SA, Bertelsmann AG, or Sony, among others, provide a growing number of countries with mass media content creation and distribution that affects national cultures. Based on power inequality, they reinforce culture homogenization (Boyd-Barrett, 1977, 2006; Castells, 1998; Appelbaum, & William, 2005). The growing opposition to such one-sided homogenization process results in constant search for alternative ways of globalization.

This study seeks to better understand the globalization process and explore new practices for globalization that are less biased culturally. By positioning at the interdisciplinary fields of International and Development Communication, intersecting with Management, and Economics, this research provides two case study analyses of the global advancement of equity and justice in media and development communication practices. It centers attention on the global-local discussion of worldwide interconnectedness, both in a socio-economic and cultural context. Studying forms of minority media, the research explores possible methods for reversing imperialism (Boyd-Barrett, 2006) in media expansion. It also tries to improve the understanding of the empowerment paradigm (Melkote & Steeves, 2001, Moody, 2003), and the ways that participatory communication (Freire, 1983, Melkote & Steeves, 2001) can successfully enhance sustainable development across cultures. The resulting findings indicate the emergence of a distinct phenomenon in the globalization process of media expansion and social development.
Such new ways of global advancement can be connected through another globalization form, “interlocalization.”

The research makes a first attempt to conceptualize a new globalization form, “interlocalization.” This form is elaborated through examination and critique of two case studies, the first involving an internationalized Catalan media firm, Grupo Planeta and the second involving a non-profit development organization, the Open Society Institute. I examine the possible implications of “interlocalization” in commercial media communication, and I explain methods for facilitating cross-cultural participatory communication.

Due to power differences, globalization results in differential advantage and disadvantage for the involved cultures that perpetuates a cycle of culture domination. This paper interprets power dialectically as a relational product and process in a socio-cultural context. As such, power is the immanent social relation exercised between dominant and inferior (Foucault, 1970). It describes the systemic advantage of a particular group as opposed to the relative disadvantage of outsiders of the group (Gramsci, 1971). Power is enacted through communication (Butler, 1997).

This research concentrates on power and culture in the context of international and development communication. Thus, the central question of this study is: Premised upon a competitive and free market system, in the context of media convergence how might a method of “interlocalization” offer a more equitable relationship for the participants of different cultures? In order to unfold this central question, the study seeks to answer to following three related questions: How does “interlocalization” differ from other types of globalization such as glocalization? Based on family ownership and profit maximizing objectives, can any evidence be observed for “interlocalization” in international commercial media? How and in what ways can
“interlocalization” play a significant role in the empowerment model of development communication?

Scholars cannot fully grasp the understanding of the interlocalization phenomenon without relying on a critical view of globalization. The critical research view holds that the relationship between power, knowledge, and discourse is produced in contexts of historical and cultural struggle. Thus, it should be studied in an ethically highlighted and politically reflective manner. The dialectical criticism of globalization aims to monitor social injustice and advance concepts on media homogenization, uneven information flow, and cultural imperialism (Gramsci, 1971; Boyd-Barrett, 1977; McPhail, 1987; Tomlinson, 1994; Escobar, 2000, Folch-Serra & Nogue-Font, 2001). This critical perspective is present in my conceptualization of interlocalization and in both case studies that stem from commercial media and development communication in the non-profit sector.

This study begins by introducing relevant globalization theories, including references to media convergence and media economics. In order to introduce the concept of “interlocalization”, I will direct particular attention to the concept of glocalization (Robertson, 1995; Bauman, 1998; Friedman, 1999; Chan 2004). After providing examples of its use, I will continue my study with a fuller conceptualization of interlocalization with special emphasis on how culture and power biases are reduced by this emerging form of globalization. To elaborate this, I will draw upon illustrations from a variety of research areas. The critical case studies presented in this research will provide further understanding of the interlocalization paradigm, namely how it plays out in actual practice.

Chapter Three is my case study on Grupo Planeta. This analysis describes how interlocalization as method can successfully serve the profit maximization of a media
conglomerate. The analysis will also provide a better understanding of how multiple layers of culture identity (Althusser, 1969; S. Hall, 1980; Phinney, 1992; Werbner & Modood, 1997) are performed by and through a family-owned company while shaping its organizational culture (Paul, 2000; Trompenaars & Wooliams, 2003) and strategic planning (Porter, 1980; Wind, 1998; Green, 1990).

The second study in Chapter Four provides an analysis of the longitudinal cross-cultural development projects of the Open Society Institute with Europe’s largest diasporic community (Appadurai, 1996; Harvey, 2003), the Roma people. The analysis attempts to uncover the ways participatory communication becomes successful in social change-related projects (Melkote & Steeves, 2001; Melkote, 2008, in press). I argue that interlocalization can be a useful tool in order to enhance the success of the empowerment paradigm across cultures.

The dissertation concludes by summarizing the concept of interlocalization as well as restating the ways it works out in the globalization process of a media conglomerate and in sustainable development projects. This research is only the first attempt to unfold interlocalization and make sense of its practical forms within our global interconnectedness. Thus, I will also indicate the limitations of this study and provide suggestion for further research.

With my research, I aim to contribute to the understanding of communities and cultural identity, particularly in the areas cross-cultural and mass communication. I put emphasis on the importance of globalization research, the need to identify and critique new forms of globalization methods and tools and the need to explore and promote strategies that work toward equity and mutual benefit.
CHAPTER I

GLOBALIZATION AND GLOCALIZATION

The introduction positioned this study within globalization research. Thus, it is necessary to have an overview of the main research streams of globalization in order to unfold the concept of a new globalization phenomenon, interlocalization. This chapter provides a theoretical overview of globalization theories with emphasis on the theory and research of Robertson’s (1992) term, glocalization.

1. Globalization, a multidimensional concept

During the last decades, different social science disciplines discuss globalization. It was McLuhan (1962) who first used the term while analyzing the effects of communication media on culture and human consciousness. He compared the world system to a “Global village” (McLuhan, 1962). Since then, the debated term of globalization carries several conceptualization attempts that are mostly tied to the context of its use. Some scholars argue that the term globalization can even replace concepts such as modernity and postmodernity (Waters 1995; and Albrow 1995).

The various social science disciplines interpret globalization quite differently. For example, referring to business disciplines, Eliers states that, in a “more restricted sense, we talk about globalization as an expression for new ways of interrelation between financial markets and business undertakings beyond nations and continents” (Eilers, 2003, p. 1). On the other hand, Rantanen (2005) emphasizes the importance of media in globalization defining it as the global interconnectedness of politics, economics, cultures, and society through mediated
communication. Moreover, scholars also debate whether globalization refers to a process, outcome, or condition (King and Kendall, 2004; Held and McGrew, 2002; Pieterse, 2001).

While they may not agree on a definition, researchers agree regarding the multidimensional meaning of globalization. Globalization certainly carries various realms of interpretations: descriptive or prescriptive (Petras and Veltmeyer, 2001; McPhail, 2002); qualitative or quantitative (Kirkbride, 2001); ahistorical (Tehranian, 1999) or historical:

One could even claim that the first social science text that dealt with the subject of globalization was *The Communist Manifesto* (1848). One could even argue that Ibn Khaldun (1332-1406), the author of *Prolegomenon to the Universal History* was the real claimant of the credit. Globalization as a social process is old and has a much longer history. Many writers have traced the early globalizing processes in the dissemination of religion and culture, interactions of people, groups, communities through trade and commerce from the ancient times. (Habibul Haque Khondker, 2004, p. 2)

I assert that globalization is a historical phenomenon, and I argue that its ways and effects are changing by the worldwide dominant modes of production. As early as in 1927, Dewey put emphasis on the new challenges to local community life initiated by the invention of steam, electricity, and telephone (Dewey, 1927). By the beginning of the 21st century, capital-based markets systems and the incorporation of societies into global capitalism have become widespread.

Capitalism relies on private property rights and competition while aiming at profit growth. Economies of scale—a term that describes “a range of production in which long-run average cost declines as output increases,” (Krugman & Wells, 2005, p. G2)—in production and profit gain through expanding export markets pushed companies across borders. Space and time were redefined with the rapid advance of transportation and communication technology. As Heidegger urges: “All distances in time and space are shrinking. Man now reaches overnight, by places, places which formerly took weeks and months of travel” (Heidegger, 1971 [1950], p.
165). As a result, aspects of the international interconnectedness became far more complex, and globalization gained new dimensions in economic and socio-cultural contexts.

This study is based on a descriptive, historical, and qualitative interpretation of globalization. My research interprets globalization as a multi-pronged (Castells, 1996) process of global interconnectedness (Tomlinson, 1999), that contains deterritorialization of capital, goods, people, and information (Heidegger, 1962), as well as acceleration of movement (speed and velocity) and change of social activities (Dewey, 1954; Eriksen 2001). I examine globalization as a long-term dialectical process (Harvey, 1989; Giddens, 1990) that alters human experience and perspectives on culture.

Culture and globalization are intertwined for many scholars. As cultural anthropologist Harris (1974, p. 226) stated: “From the eleventh century on, life became more competitive, impersonal and commercialized – ruled by profit rather than tradition.” Although Kashio (1997) warns that “the phenomenon of globalization is frequently confused with cultural imperialism,” there is a growing body of research on the socio-cultural risk (cultural hegemony, homogenization, forced hybridization) that is brought about by globalization. It includes critical, such as postcolonial or Marxist, and postmodern studies (Appelbaum, & William, 2005; Bauman, 1993; Bhabha, 2002, Boyd-Barrett, 1977, 2003; Escobar, 2000; Harvey, 1989, 2003; Hussain, 2004; McPhail, 1987, 2003, Said, 1978, 1993) that are concerned about power differences and dominant relations in the current globalization process. In general, critical globalization scholars, just as the anti-globalization movements and organization, focus on the uneven aspects of power in this global interconnectedness, and the culture imperialistic nature of the unfolding internationalization processes.
Keating & McGarry (2001) differentiated four dimensions of globalization, such as economic integration, culture, human rights and new international institutions. On economic integration they make reference to the internationalization of economic resource and conditions that provides a platform of multi-territorial (on local, regional, national, and international scale) and non-territorial (power-related race, gender, class) alliances. The cultural dimension shows how ethnic and national cultures are affected by globalization, while the human rights dimension claims space for issues of non-discrimination and equal treatment as an individual right of everyone.

McKenzie (2004, p. 14) defines globalization as a “worldwide climate in which people, industries, governments, and countries across the world are being propelled into closer political, economic and cultural unions.” He also identifies four factors that stimulate the globalization of communication processes: increased international travel, communication technologies with cross-border interconnectedness, global media conglomerates, and audience curiosity in foreign countries. Nevertheless, this global interconnectedness of economies, societies, and cultures, provoked resistance from local communities.

This global and local discussion is particularly controversial in mass media communication. The implications of the social responsibility of media communication contribute to its special status in social science research. According to Kashio, (1997) “globalization means that symbols and methods of expression lose their own origins and become more international and universal in nature.” Thus, the field of media communication contributes to the process of globalization both materially and symbolically. Moreover, with technological advancement and digitalization, the transmission and accumulation of information is more intense and immense
under contemporary globalization (Kirkbride, 2001). Due to its cultural ties, this changing media industry plays a particular role in the fast-growing interconnectedness of nations.

The accelerating media convergence and internationalization calls for the analysis of culture and power aspects in mediated communication where the local and global constantly collide. While the economic growth of some geographically well-defined leading nations is strongly bound to and driven by active media globalization, less dominant communities put special effort into culture identity preservation. A growing body of research put emphasis on the tension created by the opposing forces of global and local media.

Critical studies such as Mowlana’s work, “Foundation of Communication in the Islamic Society” (2003) give voice to alternative meanings of media rhetoric of propaganda in an international context. Her study raises the question of communication ethics with the use of media in spreading belief through extension in time and space. Also worthy of consideration is Shome’s study on the politics of cultural memory. She considers media a far from impartial vehicle that creates cultural memory across the globe. Through a study of the Princess Diane’ images in the press, she calls for resistance to this white, middle-class, English, and male imaginary that threatens to become norm in other cultures. On the other hand, this local-global debate can be viewed dialectically.

There is growing theoretical and empirical literature on globalization dialectics (Giddens, 1991; Tomlinson, 1994; Robertson, 1994; Folch-Serra & Nogue-Font, 2001; Chan, 2004). It deals with these simultaneous aspects of international homogenization and local diversification. Particularly, Robertson (1997) points out that communities, languages, and religions are all being subjected to the nature of globalization as a process of “decontextualization.” He wants to reemphasize the duality of this globalizing process with its homogenization and differentiation,
or simultaneous universality and particularity. Robertson finds that the tension of local-global is reduced by “glocalization,” a concept promoted by him.

2. The Glocalization Discourse: Diverse interpretations in various contexts

As the context of globalization has “scope and scale beyond the reach of individual influence” (Kline, 2005, p. 5), the increasingly worldwide economic, political, technological, and sociocultural homogenization processes called for resistance (Boyd-Barrett, & Thussu, 1993) from national, regional, or ethnic identities and cultures since the 1970s. Such initiatives resulted in platforms such as the Non-Allied Movement (NAM) in 1976, or the New World Information and Communication Order (NWIC) in 1980. The scholarly view of this parallel process of homogenization and local cultural resistance is quite diverse.

Modern globalization is market-driven and export-oriented resulting in some marginalization and violation of human rights. It offends the dignity of persons and nations to some extent, and this cannot be tolerated. On the other hand, it also introduces new communication technologies which can be used and harnessed to unite people, bring them closer together and raise them up from their isolation. (Eilers, 2003, p. 9)

In the last decades, large multinational and transnational companies learned that further economic success and sustainable competitive advantage is tied to the consideration of local community needs. Some believe that globalization “must not necessarily destroy or substitute local cultures. They rather should be encouraged to develop strongly on their own, especially based on their spirituality and religious roots” (Eilers, 2003, p. 9). Based on the dialectical connection of local-global discourse, a British sociologist, Robert Robertson, started to promote an alternative way of globalization (1992) that he denominated glocalization, a term that is in use by most social anthropology theorists. He claims that global cannot be understood without reference to the local. According to him (1995), globalization refers to the global
interconnectedness of consciousness and should be understood dialectically in time and space, as homogeneity and heterogeneity.

Robertson’s glocalization, is rooted in a Japanese concept: the “term ‘glocalize’ has primarily been derived from the Japanese word dochakuka, meaning “global localization”, or more accurately, “indigenization” (Robertson, 1992, p. 173). According to Robertson, dochakuka originally referred to the local modification of agriculture processes. Through the adaptation and growth of capitalistic modes of production in Japan, the term started to be used in reference to modern Japanese business practices in the last quarter of the 20th century. Observing this Japanese way of using economics of scale while adjusting to local needs, Robertson (1997) asserts, “this term actually refers to the selling, or making of products for particular market.” Thus, “the basic idea of glocalization is the simultaneous promotion of what is, in one sense, a standardized product, for particular markets, in particular flavors, and so on” (Robertson, 1997). As broader concept, “glocalization also includes the construction or the invention of local traditions or forms of particularity” (Robertson, 1995, p. 29).

Robertson’s conceptualization of glocalization was based on two main roots: in the theories of globalization dialectics of two communication scholars, Giddens (1991) and Tomlinson (1991), and the culture theories of Habermas (1994) and Geertz (1986). Giddens, the “father” of structuration theory, was never very keen on accepting the widely used term of globalization and questioned its meaning. He always referred to globalization dialectically as the opposite sites of media development through global mass media and local tradition, a “reconstruction of home.” Tomlinson looked at the globalization critically, the ways strengthening of local media respond (counter-reaction) to global media forces. On the other hand, Habermas’ social construction of identity-and-tradition, and Geertz’s idea of diversity
reduced by homogenization also invoked by Robertson in his explanation of glocalization. Overall, Robertson’s glocalization describes the “ways in which social actors construct meanings, identities, and institutional forms within the sociological context of globalization” (p. 171).

The term glocalization is used to refer to the crossroad that links the global and local. Since first used, the rhetoric of glocalization is changing considerably. By 2008, the use of glocalization varies greatly by disciplines and context. Corporations, non-profit organizations, and even scholars use the term quite differently, often diluting its meaning. For example, there is L. Stoykov’s research on Bulgarian fashion where he refers to glocalization as a “more flexible and soft” variant of globalization “as it takes into consideration and infuses in a positive manner both the global as well as the local; the uniformity as well as the difference” (Stoykov, 2006). On the other hand, Khondker (2004) refers to glocalization as a “conscious development strategy” in his study on Singapore (p. 8). Glocalization also relates to Appadurai’s concept (1996) of deterritorialized, global spatial “scapes” such as ethnoscapes, technoscapes, finanscapes, mediascapes, and ideoscapes. Moreover, in Gabardi’s analysis, this condition of glocalization “represents a shift from a more territorialized learning process bound up with the nation-state society to one more fluid and translocal” (2001, p. 33). Glocalization is applied as process, method, or tool indistinctively, and its interpretation ranges from a market share increasing strategy to the description of a process cycle of an ongoing negotiation of global influence on local cultures.

At the same time, the original meaning of glocalization has not changed its interpretation in business management and marketing. It is still considered as a useful profit-making method in foreign markets: the globalization of a product, or service while it is adapted to local needs. By
tailoring their output and organizations to local taste, multinational and transnational corporations often use a glocalized strategic approach – under the slogan of “Think Global, Act Local” – in order to gain and maintain competitive advantage (Porter, 1980). Glocalization is increasingly used both in product and service markets. For examples, international financial institutions such as banks apply glocalization strategy in marketing and promotion, or product development in order to reach new markets. Furthermore, since the late 1990s, human resources management practices introduced international diversity management with focus on the use of local talents (Mercer Consulting, 2007), localized evaluation systems, etc. The growth of consultancies with “glocalized” knowledge is also in the rise.

The goal of this glocalized business strategy is to acquire sufficient knowledge of the local culture in order to successfully reach new customers, extend markets, and increase market share. If a company sufficiently adapts its products or services, it can appeal more to local consumers and can be sold more successfully. The effect on local culture is not of concern in this profit maximization process. Multinational corporations simply create new consumers and do not worry about the change their activity or product initiated in a culture. Critiques of glocalization often point out this potentially harmful aspect of the process. Among them is the Polish sociologist, Zygmund Bauman (1998).

Bauman (1998) examined globalization from a political-economic point of view. The founder of post-modern consumerism (1993), he worked extensively on aspects in globalization such as mass consumption, and time-space compression. He (1998) finds that four interrelated factors are the major causes of globalization in the late 20th century. These are: “a new international division of labour; an internationalization of finance; a new technology system and
a homogenization of consumer markets” (De Vries, Visscher, & Gerritsen, 2005, p. 10). These factors result in global producers and global consumers.

Baumann (1998) agrees that one of the important factors of glocalization is the new communication technology – mainly telecommunications – that allows the interconnectedness of the global and local. The extended use of these new technologies initiated a “geographical reorganisation of core economies” (De Vries, Visscher, & Gerritsen, 2005, p. 10). But this reorganization does not result in equal distribution of wealth, or equal opportunity for all cultures and people. According to Bauman (1998), glocalization does not provide solution for the negative hegemonic effect of globalization. While Friedman (1999) classifies globalization good and bad according to the conscious understanding of the global’s effect on the local, it is polarization that Bauman (1998) is concerns with:

The rich are only trying harder to make themselves wealthier, and create the conditions to do so. This is a typification of polarization. People are fed with the economic idea of world binding flows of goods and money in indoctrinating manners. (De Vries, Visscher, & Gerritsen, 2005, p. 15)

The freedom of purchase should not be confused with freedom of the individuals and free choice of culture. Through global commerce and international mass media, it is the effect of dominant culture groups on local cultures that worries scholarly critiques of globalization or glocalization.

Glocalization research pays limited attention to cultural domination among the interconnected nations or groups. In celebrating glocalization, scholars tend to soften the effect of a dominant culture on local groups. Gabardi (2001) describes culture as “a much more mobile, human software employed to mix elements from diverse contexts” that creates forms and practices separate from institutions and geographical determination (p. 34). Thus, “we are witnessing what Jan Nederveen Pieterse refers to as postmodern ‘hybridization’” (Gabardi, 2001, p. 34). Unfortunately, the distinction among concepts such as hybridization, glocalization, or
indigenization is quite unclear. Giulianotti & Robertson (2006) recognizes that glocalization:

> has some connection with other concepts such as ‘indigenization’ (Friedman, 1999, p. 391), ‘creolization’ (Hannerz, 1992, p. 264–6), ‘vernacularization’ (Appadurai, 1996) and ‘hybridization’ (Pieterse, 1995). Each of these concepts registers the agency of quotidian social actors in critically engaging with and transforming global cultural phenomena in accordance with perceived local cultural needs as well as values and beliefs.” (Giulianotti & Robertson, 2006, p. 173)

In their recent article on Scottish football supporters in North America, Giulianotti & Robertson (2007) try to clarify the difference among these closely related terms. As Robertson wrote earlier in 1995: “In cross-cultural terms, glocalization does not simply produce or reproduce random forms of cultural heterogeneity. It also registers the ‘standardization of locality’ so that various localities may possess very similar structures, reference points, symbolic textures or contents” (p. 30-31). They developed a four-fold typology. In their suggested model applicable to glocalization projects of migrant cultures, they use four concepts such as relativization, accommodation, hybridization, and transformation. Nevertheless, the main concern about the occurrence of cultural hegemony (Gramsci, 1971; Berger, 1995) or cultural imperialism (Schiller, 1976; Boyd-Barrett, 1977; Tomlinson, 1991; Rothkopf, 1997) remains unclear.

In the critical view of glocalization, one of the major concerns is that the globalization effect might be hidden under glocalization. The “otherization” of local culture even can make local culture foreign (e.g., Western movies in Thai costumes, made in Thailand) or vice versa. Friedman claims attention to such phenomenon. In his definition (1999), glocalization should be understood more broadly and critically. According to his interpretation, glocalization is "the ability of a culture, when it encounters other strong cultures, to absorb influences that naturally fit into and can enrich that culture, to resist those things that are truly alien and to compartmentalize those things that, while different, can nevertheless be enjoyed and celebrated
as different” (Friedman, 1999, p. 25). In his debated book, *The Lexus and the Olive Tree* (1999), Friedman distinguishes good and bad glocalization. In good glocalization, the person from the local culture is aware of the origin of the glocalized service of goods, while in bad glocalization the global content remains hidden from local consumers. The root of the problem remains in the power relation of the interacting cultures.

Culture should be qualified in relation to others and in dependence on the context in which this relation occurs. This context is determined by the economic, political, and social power structure. Henry (1999) points out that dialectics of globalization should be viewed critically as the “new dialectics of globalization feed upon an unachieved colonial dialectic” (p. 4). Although Friedman (1999) includes some elements of Gramsci’s (1971) cultural hegemony into his concept of glocalization, the question of cultural influence and the dynamics of strong and weak cultures, in other words, the ideological struggle against cultural colonialism of the West, still remain unsolved. Through global producers the pressure is still from above. In addition, aided by the development of global communication, cultures influence each other on a growing scale. The question remains regarding how the local participation happens: is the cultural change is voluntary within its own choice of speed and space, or is change induced by the needs of a dominant culture? In global interconnectedness time and space lose their boundaries. Moreover, “when space and place is ‘boundaryless’ a human being is losing his identity” (De Vries, Visscher, & Gerritsen, 2005, p. 10). Mass media communication and digital media can not only induce but also accelerate this process of identity crisis.

Glocalization has particular importance in mass communication. Without global communication, there could not be a global marketplace (Tehranian 1999). While dealing with
the issue of cultural dominance, Chan (2004) applied this glocalization approach within the media industry:

Added to the force of local resistance is the primacy of cultural proximity at the consumption level. Many global media operators have subsequently learnt to localize in order to increase their popularity. This may result in superficial adaptations to the local or in more genuine cultural synthesis of the local and the global. (Chan, 2004, p. 26)

This parallel development of global and local media might allow cultures to adapt changes in a different pace and mass. “The global is thus embodied in the commonality of cultures on the one hand and in the diversity of hybridized cultures on the other” (Chan, 2004, p. 24). With the new trend of media globalization and localization, culture hybridization can slowly become integral part of cultural change within the borders of local cultural needs and acceptance. As Chan stated, the “local can be so strong that the global itself becomes localized in the course of production, marketing and distribution. Or at least, the global can be localized during consumption” (Chan, 2004, p. 25).

During my research on the Catalan mediascape, I observed a new form in media globalization dialectics: “interlocalization,” or the global interconnectedness and exchange of local knowledge and know-how, based on equal power relations and without the element of cultural domination or homogenization. Chapter Two provides a conceptualization of this new phenomenon.
CHAPTER II

CONCEPTUALIZATION OF “INTERLOCALIZATION”: THE HORIZONTAL ASPECT OF GLOBALIZATION

According to Henry (1999), “the ‘globalizers’ almost inevitably provoke ‘moralizers,’” who seek solutions in cultural authenticity, affirming a religious or ethnic identity, or in at least reaffirming traditional nationalism” (p. 4). Due to the cultural aspects of mass communication, international communication scholars look into this culture interconnectedness and identity change critically. Boyd-Barrett (1993; 2003) claims that two concepts, “competitivization” and democratization had major impact on the uneven growth of media globalization. Both tendencies reinforce the gap in the power relations of international communication. Conducting research on Catalan mediascape, the study of these tendencies aided my analysis. My findings lead me to observe the emergence of a distinctive form of globalization, “interlocalization.”

Seemingly, glocalization offers some solution for the damaging effect on cultures resulting from the domination of global. The national culture – represented by a corporation or other organization – that initiates contact and carries the global element still have strong effect on local cultures. I agree with Straubhaar (2007) that glocalization is useful “to describe deliberate borrowings and adaptation of global forms by local, national, and regional actors” (p. 53), but it does not solve problems caused by power differences of interacting cultures. In fact, there is growing body of research that proves the damaging effect of large corporations on foreign cultures. In particular, mass media convergence of large media groups has such negative effect on local – both minority and national – cultures. With its direct culture context, the study
of media corporations can serve as useful aid to unfold cultural relations of interconnected organizations and observe different aspects of modern globalization.

My conceptualization of interlocalization is connected to the critical view of globalization, particularly cultural hegemony and media imperialism (Boyd-Barrett, 1977). As explained earlier, glocalization still contains the element of (mostly hidden) hegemony or cultural exploitation by dominant groups in “the world of which ‘goes without saying’” (Berger, 1995, p. 63). On the other hand, Ogan (1988) posited that "Third World consumers of [foreign] media products will be influenced by the values inherent in that content, the values of an alien and predominantly capitalist system" (White, 2001, p. 94). Cultural imperialism has an almost tangible form in global media. Boyd-Barrett defined media imperialism as "the process whereby the ownership, structure, distribution, or content of the media in any country are singly or together subject to substantial external pressures from the media interests of any other country or countries, without proportionate reciprocation of influence by the country so affected" (Boyd-Barrett, 1977, p. 117). Glocalization in the media industry can quite successfully cover the imperialistic effect of large media groups as their product adapted to local acceptance. Thus, glocalization still contains the hegemonic effects of globalization.

Studying the Catalan mediascape, I found some media globalization practices that are based on a more equal relation among participating cultures. In the case study portion of this dissertation, I provide proof of such a new phenomenon. Nevertheless, interlocalization can be observed not only in the commercial media industry. There are other fields that also show signs of this new phenomenon, interlocalization. As I observed, in any of these situations Bhawuk’s statement is applicable: “To be effective in another culture, people must be interested in other cultures, be sensitive enough to notice cultural differences, and then also be willing to modify
their behavior as an indication of respect for the people of other cultures” (Bhawuk & Brislin, 1992, p. 416). Thus, during the process of global interconnectedness, none of the participants carries larger power, nor it imposes cultural dominancy on other cultures. Interlocalization allows democratic relation among participating cultures and communities.

As presented earlier in Chapter One, the rhetorics of globalization carry different meanings. Referring to a generic and neutral meaning, I distinguish three different forms of globalization such as hegemonic globalization, glocalization, and interlocalization. **Interlocalization defines a domination-free interconnectedness of two or more cultures in an international context.** It is aided by or results in a general know-how on a global level that can modify the participating cultures according to their need or agreement. The generic components of interlocalization are the following:

1. Interlocalization can be applied only in situations where participants belong to culturally distinctive communities. Thus, interlocalization occurs in cross-cultural contexts, although it can be aided by intercultural (minority-majority) experience.

2. Interlocalization represents the *horizontal* aspect of the globalization process. While almost all studies of globalization/glocalization contain a vertical (in critical studies hegemonic) view of the Global-Local debate, “interlocalization” studies the horizontal dimensions of internationalization, or the interconnectedness of local-to-local. In such a relation, I do not refer to local merely as geographic location. I refer to local dialectically in relation to global, and critically as a culture site and space. For large multinational corporations, Asian or African national markets are represented as “local.” Similarly, in the Spanish communication market, autonomous community media (e.g., Basque or Catalan media) are referred to as local. Thus, local refers to a
culture-specific community and contains a system of meanings shared by members of such community.

3. The non-discriminative nature of cross-cultural relations forms the base of any interlocalization process. In interlocalization, there is no distinctive power difference among the participant communities. The interconnectedness of culturally distinct communities goes beyond the critical opposition of local tactics or the “ways of operating” (de Certeau, 1988, p. XIX) against global strategy as the “place of power” (De Certeau, 1988, p. 36). The interlocalization-based relation relies on the experience of many and not on the interest of one. Through dialogue and mediation, the participating cultures become a dynamic social force. Thus, the non-essentialist view of culture is applicable: “Cultures can flow, change, intermingle, cut across and through one another, regardless of national frontiers, and have blurred boundaries” (Holliday, Hyde, & Kullman, 2004).

4. The non-discriminatory cross-cultural connection of local-to-local occurs through horizontal (peer-to-peer) communication. Horizontal communication opens the possibility for dialogue and allows the negotiation of different culture interests. Horizontal communication also facilitates mediation and a democratic relation among participating communities. Furthermore, it is a necessary element of action research (Lewin, 1946) and participatory communication (Belbase, 1994).

5. A decentralized organizational structure is a prerequisite for interlocalization. Only decentralized organization models allow extensive horizontal and bottom-up communication and participatory decision-making processes. Needles to mention that not every decentralized organization relies on interlocalization in its
internationalization process. The ultimate organization goal (profit or non-profit) and the qualification of goods or services will also determine strategic choices in organizational growth.

6. In profit companies, only *culture-specific products* tend to get interlocalized. In order to proceed with interlocalization in its international expansion, an organization should produce goods and services with higher degree of culture component in their content such as books, movies, news, theatre, food, etc. Only the promotion and sales of such culturally specific products can contain homogenizing threat through the hegemonic relation of participants. Generic products that are far less specific culturally will not tend to rely on interlocalization. Instead, they will tend to use hegemonic globalization or glocalization method of internationalization.

7. In interlocalization, production and profit growth will rely on *diversification and niche marketing* as companies specialize their products for culturally diverse markets. In the production and promotion of culture-specific products, profit organizations will rely on competitive advantage and mostly likely use *Focus strategy* (Porter, 1980), and not Cost or Differentiation strategies while targeting broad consumer base (Porter, 1980) if they opt for interlocalization. Focus strategy will target a special segment of the market with sub-optimization of resources based on narrow scope of activities (Porter, 1980).

8. Finally, the dimension of “interlocalization” is *context specific*. As Kornai said in an interview with Oliver Blanchard in 1999: “After all, it is the context that defines how a certain phenomenon should be interpreted … everything depends on the context” (Samuelson & Barnett, 2007, p. 74). The specific context of interlocalization varies
from business relations through artistic connections to identity formation. The context will define the dimensions of interlocalization as a process, method or tool.

**Figure 1. Some aspects of the interwoven nature of global interconnectedness**

Interlocalization is a *multidimensional* concept with some level of connection to the vertical processes of glocalization and globalization. The graph represents such relations in the context of cultural dominance. The spearheaded globalization shows how the organization representing a dominant culture has hegemonic effect on other cultures. In glocalization, the local gains some voice in the process but is still dominated (openly or hidden) by the culture of the globalizing force. Interlocalization represent a horizontal power relation that is intervowen with other forms of globalization. This interrelationship among the various forms is changing through time. Although this study points out some of the aspects of this connection among the different forms of globalization (hegemonic globalization, glocalization, and interlocalization), there is need for further studies on the subject.

Overall, interlocalization accommodates the mutual interests of participating cultures that otherwise would not occur. Contrary to hegemonic globalization and glocalization, interlocalization, based on participatory communication, facilitates the democratic creation of new knowledge through mediation of cultures and negotiation of traditions and experiences.
Moreover, dimensions of interlocalization can describe a process, a method, or a tool used in the internationalization process. The exchange among culture groups represented by individuals or organizations is an interlocalization process. If during this process the local-to-local – that can be represented by national cultures – relation aims to create a global know-how or global action, interlocalization serves as tool during this creative process. The participants can form an “Orchestra of cultures”, in which “each culture plays a distinct note in the chorus of the collective social existence and where people's individual voices can be found and heard (Lum, 1996, p. 113). Finally, in case the interconnectedness of local participants is aided by a global technology and managerial know-how, the interlocalization process can be used as profit-making method of a company. Such method is described in the case study of Grupo Planeta, a Catalan media conglomerate.

Although first observed in mass media, interlocalization is not restricted to the communication industry. It occurs in very different sectors from arts to industry, from politics to the fields of development communication. I would like to provide just a few examples.

a. **Process:** Interlocalization as the occurrence of global interconnectedness among various cultures without power differences can be present in the culinary industry.

Anyone who travels to different countries can easily observe that some cultures are represented in a large number of countries through their food. As such, there are a growing number of individually owned (family ownership) Chinese and Middle-Eastern restaurants in the Western countries. Although each establishment can use the glocalization approach while they adjust their menu and quality to local taste, the restaurants themselves cannot be considered as a glocalized phenomenon. They do not represent the dominant power of a multinational corporation that would jeopardize local cultures through drastically changing local food taste.
The individual ownership makes the approach of these small family businesses an interlocalization process. In many countries, there is a growing need for restaurants from various cultures. Food and eating habits get globalized. It would call for a further study how much of these restaurant are tied to immigration and ethnic identities, and in what proportion this need for food variety facilitates immigration.

b. **Method**: Interlocalization as procedures for improvement can be well observed in the development of ethnic media organizations. Although it is challenging is to observe interlocalization as method in commercial media companies – strategic information tends to be private, thus non-disclosed – my research on Grupo Planeta confirmed that an ethnically owned media groups can approach media internationalization differently and use alternative growth strategies in media mergers and convergence.

Telecommunication and media industry deals with culture products. Thus, the quality of the industry gives space for the possible practices of interlocalization as a more equitable form of globalization. Moreover, minority-owned communication companies have rather particular experience while trying to preserve their cultures. Based on their accumulated experiences in majority-minority struggle, ethnic and minority media companies learn to appreciate other cultures. Large media corporations that originated from powerful national cultures and represent the majority in power, tend to use a generic view of their consumers: they look at their audience as culturally neutral. Their media content (both news and entertainment) reflects their cultural values and experiences. Nevertheless, those media companies that originated from minority communication are familiar with oppression and the power struggle between the majority versa minority cultures. During the growth process through media convergence, these minority-owned
companies can use the inter- and cross-cultural synergy of the acquired knowledge to local socio-cultural considerations of other nations.

Minority-owned media corporations can acknowledge the importance of culture identity of their consumers. As a reflection to such acknowledgement and value to other cultures, the newly acquired companies maintain their culture autonomy in content creation and promotion. Adjusting their organization and strategic method for such interlocalization would allow the corporation to gain and maintain market share and maximize profit. As the case study on Grupo Planeta indicates, this interlocalization method goes hand-in-hand with technological and managerial glocalization.

c. Tool: Interlocalization can serve as cross-cultural creation of the global in various fields of socio-political considerations and also in arts. As a result of interlocalization, the participants of such processes “navigate the turbulence of cross-cultural dynamics in order to co-create a constructive future together with cultural others.” (LeBaron, & Pillay, 2007, p. 58).

Examples of such processes could be cultural, political, economic alliances among cultural minorities that reside in different countries such as Catalans from Spain (minority nation) and Catalans from Southwest France (ethnic minority), and create common agenda and action for the betterment of their communities. As counter reaction to media hegemony (Boyd-Barrett, 1977), news agencies from developing countries are forming platforms in order to defend culture heritage and preserve local cultures. The outcome of such alliances would benefit all the participant new agencies. Thus, I would consider these platforms as interlocalization. A rather particular example to interlocalization can be drawn from performing arts, the activity of a theatre group, “La Fura Dels Baus” (Ciatre, 2006).
Restless in its search for new artistic paths, a Catalan performing group, “La Fura del Baus,” – who performed at the opening ceremony of the 1992 Barcelona Olympic Games – originated an unusual approach to globalizing theatre performance. Their digital theatre experiences called for a globally transmitted performance created by the participation of various theatre groups from a variety of European locations (La Fura Dels Baus, 2007a). They refer to such a project as the “sum of actors and bits” (La Fura Dels Baus, 2007b). The first so-called Work in Process (WIP) was created in November 1995 by two ethnic theatre groups, this Catalan “La Fura Dels Baus” and “Brith Gof,” a Welsh theatre group from Cardiff (La Fura Dels Baus, 2007b). The following WIP in 1997 involved 4 European cities, Freiburg (Germany), Brussels (Belgium), Tarrega and Girona (Spain), where the group worked at each location for 23 days. They had four performances per location, staged for a local audience that was transmitted through the World Wide Web, creating a theatre experience available for a virtual audience. Due to its success, “La Fura del Baus” continues with such projects in many locations around the world on board their ship Naumon.

These projects call for the cultural interconnection of very distinct theatre groups. The local experiences are shared and used creatively in order to build a new joint experience. During the interactive creative process, they film local experiences, transport them to other spaces in order to increase and infuse them with new ideas. Then they retransmit them to its original location for re-alimentation and retransmission (La Fura Dels Baus, 2007b). Through this connection among different local sites and local vibrations (transmission of live productions), they create an international experience available through global digital communication (La Fura Dels Baus, 2007b). There is no power relation among the participants. Thus, the components
representing different cultures cannot create or claim cultural hegemony. Consequently, the final theatre experience is the result of interlocalization.

These international theatre projects create a new content industry based on the exchange of local cultural specifics where both the performers and the audience represent various national and ethnic cultures and identities. Among the participants of such projects we can observe cultural fluency, or the ”readiness to anticipate, internalize, express, and help shape the process of meaning-making” (LeBaron, & Pillay, 2007, p. 58). As the leaders of “La Fura Dels Baus” expressed, their aim is to disintegrate physical and cultural frontiers with creating intercultural union (La Fura Dels Baus, 2007b). They aim to provide a space for cultural analysis and social criticism, a site for social change, and a harbor for community action and collaboration. As with their other theatre performances, the digital theatre projects also challenges societal gender norms, and reaches out to both local and global audiences as a vehicle for intercultural communication (La Fura Dels Baus, 2007b). To achieve such a goal, they successfully use interlocalization as a tool.

Another example of interlocalization as tool can be found in development communication (Moody, 2003). I could refer to development projects such as agriculture aid in Africa, the cross-national projects aiding Roma diasporic communities across Europe, or AIDS and leprosy projects in various communities of India. The locally gained experience and knowledge that development agents accumulate through participatory communication (Melkote & Steeves, 2001) within a specific community also can be useful in other community projects, or in other locations. Collecting and exchanging this accumulated knowledge obtained through successful participatory communication practices can result in the creation a pool of know-how. This knowledge pool would be a valuable socio-economic asset in future development projects.
globally. The Open Society Institute’s 15 years longitudinal project with Roma people in eight European countries provides a case study for such use of interlocalization.

Overall, interlocalization allows cultures to become a dynamic social force: “Cultures can flow, change, intermingle, cut across and through one another, regardless of national frontiers, and have blurred boundaries” (Holliday, Hyde, & Kullman, 2004). Through the relation of local-to-local, interlocalization can lead towards a new formation of socio-political structures that are not based on nation states but culture similarities and regional communities. It can also aid the reorganization of human social groups through cross-border cultural unification. Thus, interlocalization can lead to a major change in the context of human unity in diversity.

I advocate that “…theory is just construction of frameworks to understand how real systems work” (p. 23). Thus, following the principles of praxis, I proceed with the two case studies. The following case studies on the Catalan mediascape, and on the Roma projects of the Open Society Institute, search for evidence of interlocalization.
CHAPTER III

INTERLOCALIZATION AS METHOD IN THE CATALAN MEDIA FIRM, GRUPO PLANETA

Catalonia is a Spanish minority nation that increasingly relies on internationalization as a growth strategy for its industries, including communication industries. This case study examines the media growth and globalization process of a Catalan communication conglomerate, Grupo Planeta. The research sets its focus on the company culture aspect of the international growth of Grupo Planeta [Planeta Group], with special attention on the use of interlocalization as globalization method. The study searches for the roots of Grupo Planeta’s interest in allowing the presence of diverse local, regional, or national cultures in its product development. As such, the research concentrates on the effect of the owner’s identity – the influence of his values and perspectives – have on organizational culture mergers practices. It questions whether the post merger organizational structure and culture interferes with other cultures through the content creation and distribution of its subsidies. Overall, the study tries to reveal emerging forms of power and culture aspects of globalization through the participation of minority media in the global arena.

Introduction

In the past decades, media observers witnessed the internationalization and convergence (Chan-Olmsted, 2006) of media industries on a global scale. One of the most salient aspects of media convergence is its effect on national sovereignty. With more countries adopting capitalistic modes of production, commercial media can compete in enlarged and highly competitive markets. As business strategies are mostly based on market power position, the
national or local culture of consumers become nearly irrelevant for profit-oriented companies, that is, unless the recognition of such cultural differences aid their profit-making process.

In general, the growth process of media firms is tied to economies of scale (Krugman & Wells, 2005). With the fall of cost per unit, companies can reduce price and gain in market share. Particularly, communication companies can use multiple platforms and various mediated communication forms in content creation and distribution. Adopting economies of scale internationally facilitated the creation of large global media corporations.

According to Boyd-Barrett, global media should be understood as “predominantly national media that had achieved significant penetration of world markets” (2006b, p. 34). Thus, large media corporations promote globally induced but culture-specifically produced content (Boyd-Barrett, 2006a). With distribution of such content, these media corporations transform local cultural traditions, as consumers tend to mimic transmitted media content (Boyd-Barrett, 2003). As a result, communities and countries are becoming homogenized by sophisticated techniques of cultural imperialism aided by forms of technological advancement. With such process, the internationalization of the media industry raises serious concerns about strengthening media imperialism (Boyd-Barrett, 1977) that is tied to the culture influence of dominant nations over other societies and cultures.

Along with the growth of international media, the local media content becomes heavily contested in the process of media convergence. This paper argues that this local culture is not only gaining space in the nation states of the Third World but within the minority or ethnic communities of developed nations. I contend that through alternative forms of growth strategy, the context of ownership-specific convergence of media companies becomes highly relevant in content creation and promotion. The unintended contra-flow by minority-owned commercial
media companies can result in new ways of profit maximization, such as interlocalization, that is less harmful to local cultures. The progress of a European minority media, the Catalan mass media communication, offers an interesting example of minority participation in the global arena.

This chapter examines how globalization plays out in minority media convergence and international expansion. First, I put in context Catalonia as a Spanish minority nation. After reviewing the theoretical background of media convergence, and describing the methodology approach applied in this case study, I proceed with my interpretation of the internationalization of Grupo Planeta (the Group). In order to give cultural context to my interpretation, I summarize the Spanish and Catalan media evolution during the last two decades, and I give an overview of the branches and activities of Grupo Planeta. Then I analyze how interlocalization is rooted in the intercepting identities of this family-owned Catalan company. Finally, I explore the organizational culture and strategy of Grupo Planeta in order to understand how interlocalization is used as method in its globalization process. This chapter concludes with the summary of my project indicating area for future research.

1. The Catalan Nation and Its Media industry

Western Europe is deeply involved in globalizing the reach of its telecommunications (McPhail, 2002; Chan, 2004; Ha, & Ganahl III, 2006; Khiabany, 2006). Among other countries, Spain is engaged with the socio-economic process of active internationalization. Relying on language and culture commonality, the slowly unfolding Spanish globalization is strongly tied to Central and South-America. One of the Spanish autonomic communities, Catalonia, is the most active participant in this economic and media globalization (Folch-Serra, & Nogue-Font, 2001). The rise and increasing influence of Catalan media suggest that local ethnic communities might
play a more relevant role in media globalization than that portrayed in current scholarly research. In order to understand the role of the Catalan mediascape, I briefly explain Catalonia’s place and historical ties to Spain.

**The Catalan nation as the largest minority group in Spain**

Spain is a multicultural society. Since 1979, the second article of the Spanish Constitution recognizes and guarantees the right of autonomy to the nationalities and regions that form Spain. Since 1983, the autonomic and local governments represent this Spanish culture variety: all territory under the Spanish sovereignty (except Ceuta and Melilla) is organized into 17 autonomous communities (Barton, 2004). On December 18 1979, King Juan Carlos I approved, as an Act of Parliament, the Statute of Autonomy of Catalonia (Generalitat de Catalunya, 2006). This law established a framework for political and economic decentralization characterized by flexibility, heterogeneity, and progressiveness (Lopez, Risquete, & Castello, 1999).

The Catalan autonomous community, Catalonia, is located on the northeastern coastal (Mediterranean) part of Spain, along the French border. It is the largest autonomous ethnic community with 6 million inhabitants (although over 10 million Spaniards speak Catalan language in Spain), representing roughly 15 per cent of the Spanish population (Generalitat de Catalunya, 2006). The Catalan language is a Western Romance language with Latin roots that was fully formed by the 10th century (Language Studio, 2006). It significantly differs from the Castilian language, being closer to the Italian or French languages. The Catalan language considered being the eighth most spoken language in Europe that is used by Catalan minorities in three countries such as Spain, France, and Italy. Its geographical spread resulted from the historical roots of the Catalan nation (Grane, 2007)
With a distinct culture, the Catalans formed a separate country, a kingdom, only for a short period of time (during the 13th century, under the rule of Jaume I, King of Catalonia and Valencia) although it was an independent county for almost three centuries (Balcells, & Walker, 1996). During the rule of the Catholic Kings, the larger Spanish kingdom soon annexed the Catalan territory and nation to the Spanish crown (Trueta, 1946). Today, Catalonia is highly industrialized with the highest GDP per capita within the Spanish economy—contributing more than 22 per cent to it (Generalitat de Catalunya, 2006). There are large, internationally known Catalan companies in various industries such as automotive industry, metallurgical industry, construction, textile industry, food processing, or in services such as tourism, or banking. Moreover, “there has been a substantial growth in the number of Catalan manufacturing enterprises establishing production subsidiaries abroad” during the last couple of decades (Alvarez, 2003). Hence, Catalan became one of the leading community in the Spanish globalization.

Parallel to Spanish globalization process is Catalan media growth. Catalan culture preservation became an important focal point of media development. This media growth is seen not only within Catalan public media, but also within Catalan commercial media convergence. Studying these emerging Catalan media conglomerates gives insight into the ways Catalan media growth affects local communication and minority/ethnic culture identities in the international arena.

The development of this ethnic origin commercial media indicates that social responsibility toward local cultures might create a significant return on investment for media firms. Through decades of power struggle with the dominant Spanish leadership, these companies obtain a unique perspective on the creation and operation of successful local media.
Therefore, the Catalan media convergence and internationalization also indicate several new emerging factors in the understanding of globalization dialectics.

This research provides support for the use of the newly introduced term “interlocalization.” It aids an understanding regarding how new forms of globalization emerge through the international growth of ethnic-based media conglomerates. It indicates that grassroots media (Rodriguez, 2001) can achieve both a commercial and public role. The advancement of Catalan media conglomerates offers a case study on the process of how minority commercial media companies become internationalized and on the way to globalization.

According to Folch-Serra & Nogue-Font (2001), by erasing differences and division but also creating local diversity, globalization should be conceptualized dialectically. Particularly, culture contains a dialectical meaning in a global context. As Chan (2004) said, “the global is always becoming” as cultural globalization is “not a completed process” (p. 24). In the process of eliminating with preserving, as Hegel would note, the tension between tradition and new elements result in change of culture.

“Given the uneven resistance of the local, however, cultural globalization does not take place at a uniform speed. The global is thus embodied in the commonality of cultures on the one hand and in the diversity of hybridized cultures on the other.” (Chan, 2004, p. 24)

In this dialectical process of globalization, minority identities and local cultures can be enhanced through the intentional promotion of local media. In order to explain the process, Folch- Serra & Nogue-Font establish a link between civil society and its representation through the media (2001). The public media locally represents this socially responsible citizen media. I argue that social responsibility and citizenship can create value for ethnic origin commercial media also.
Moreover, Catalonia as a minority autonomous community counts on various ethnicities within it due to recent broader immigration. The media needs of these new ethnic communities are already considered and addressed by Catalan public media (Orta, 12. 06. 2006). It is not in the interest of the Catalan media groups to discard the participation of these emerging ethnic communities in their media presentation. Interlocalization applied in the growth process of Grupo Planeta could also indicate such opportunity for these emerging ethnic media in Catalonia.

Interlocalization is part of this dialectical process. In global interactions, cultures influence each other and cause change and hybridization. Through interlocalization, culture elements are not induced externally by the national culture of a global media corporation. The method of interlocalization facilitates smoother changes within. Thus, communities and local cultures (as sites and spaces, not merely as geographic locations) can change dialectically while maintaining traditions and slowly adjust to global changes.

This chapter explores the internationalization of a Catalan media conglomerate Grupo Planeta, and supports the view that the original local media are not left behind. Such form of globalization includes media expansion across nations, and the strengthening of local communication as well. The study compares the characteristics of interlocalization described in Chapter Two with the internationalization practices of Grupo Planeta. Thus, my research will concentrate on the following aspects of the Group:

- Search for the presence of horizontal globalization as local-to-local relation;
- Examine the power relation in the merger processes of Grupo Planeta while searching for hegemonic or non-discriminative practices in its cross-cultural relations;
- Identify the organization model of Grupo Planeta that determines major communication and decision-making practices of the conglomerate;
Examine international competitive strategies of the Group

This research also reveals some aspects of the multiple layers of culture identities and intercultural experiences of the owner, Jose Manuel Lara Bosch. Under the leadership of Lara, this privately owned publishing Group became a communication conglomerate by the 1990s. Due to family ownership, the intercepting identities of Jose Manuel Lara Bosch become relevant when choosing globalization strategies and methods for the internationalization of Grupo Planeta.

**Convergence, diversification and media ownership**

The new trends in the media landscape, described by Chan-Olmstead (2006), include convergence, consolidation of ownership and conglomerates. Convergence is understood as the merger of three distinct industries such as media, telecommunications and information technology (Chan-Olmstead, 2006). Consolidation of ownership results in market concentration and market expansion through economies of scale and scope. It also acts as catalyst for globalization. The resulting media conglomerates diversify media services with increasing market share and power. To achieve and maintain higher market share, media conglomerates can choose different growth strategies.

Strategy is the analysis, decisions and actions a media organization takes to create and sustain competitive advantages (Chan-Olmsted, 2006). The strategy of these media expansion is often based on Porter’s (1980) strategy typology of Cost, Differentiation, and Focus. Media expansion often happens through convergence and diversification.

Just as any profit company, private media organizations also try to maximize the value and minimize the cost (Chan-Olmsted, 2006). The most common way to media growth is through convergence. There are three facets of this convergence. On one hand, it is the
integration of different communication and telecommunication technologies, and on the other hand, it deals with the mergers and acquisitions of media companies. The third way of looking at convergence is through content distribution. According to Dennis, convergence is “the distribution of the same content across different channels” (2003, p. 458).

There are five participants in communication and media industry: carriers, content producers, manufacturers, consumers, and “conducers,” the term coined by Simmons, the telecommunication professional (P. Simmons, E-mail communication, November 11, 2006). Carriers are distributors and infrastructure providers, companies that transport information such as a telephone company, a “play out” broadcasters, or YouTube in the past. Producers on the other hand, create content for any media channels (print, flow, or Internet). The manufacturers are companies that directly tied to high technology with their production of hardware and software, while the “conducers” are the producers/consumers of emerging media such as individual webcasters or webpages (P. Simmons, personal communication, November 28, 2006). All these players participate in media convergence.

Wirth (2005) categorized five major research paradigms on media convergence. According to the type of convergence, studies are conducted on the following: the role of substitutes and complements; the change in media industry structure; convergence as business strategy; relation to consumer demand; relation to media culture. Wirth claims that media convergence, influenced by merger and acquisition strategies –including “forced” marriages – transforms media and telecom industries from vertical businesses to horizontal segments (2005, p. 451). This research focuses on the relationship between convergence and media structure with focus on cross-media ownership. Examining the Grupo Planeta, I explore the horizontal and vertical integrations with a focus on the impact of convergence on “interlocalization.”
2. Critical Analysis as Methodology for Investigating a Media Conglomerate

This study is an in-depth critical case study on a leading Catalan media conglomerate, Grupo Planeta. Thus, the unit of analysis is tied to a bilingual (Catalan/Spanish) minority community. For this study I chose an inductive approach to inquiry (Lindlloff, 1995) as my goal was to present the insider's perspective rather than imposing an outside perspective on the subject. My study is related to social transformation. Thus, I used the method of critical analysis relying on Geertz’s notion of thick description (Geertz, 1973) as I tried to break down the subject-object duality within culture and inquiry.

The research is based on two major sources: secondary data analysis and quasi-ethnographical interviews. I largely relied on writings of Jose Manuel Lara Bosch, the President of Grupo Planeta, and on digital information such as company websites, news coverage on the Catalan mediascape and of Grupo Planeta (mostly La Vanguardia Digital and El Pais, digital version), Web-site of the Generalitat [Catalan Government], La Oficina de Estadisticas [Office of Statistics] in Spain, I also used both company and media research publications in English, Spanish and Catalan languages, and I also used my previously conducted case study on the Catalan press, broadcasting, and emerging media. As primary research, I conducted several interviews in person, on the phone, and by E-mail with several media and telecommunication experts located in Barcelona. When I chose my interviewees, I used my professional and social network in Barcelona.

The interpretive method is meaning-centered and relativist, that uses idiographic approach that “stresses the importance of letting one’s subject unfold its nature and characteristics during the process of investigation” (Burrel and Morgan, 1979: 6). My research subject is a conglomerate that employs over 5,000 people. In order to get a more reliable data, I
decided to interview not only executives that work in Grupo Planeta, but also other Catalan media professionals and media experts. They provided me valuable information on the perception of the company and information of the Catalan identity and media. My interview subjects were:

- Executives A, B, C, employed by Grupo Planeta (due to confidentiality, their identity must remain undisclosed)
- Dr. Pere Masip (Catalan), communication professor at the Universitat Ramon Llull, Barcelona;
- Jesus Conte (Catalan), journalist, Director of ConteBCN Comunica, and former Communication Director of Jordi Pujol, President of the Generalitat of Catalonia
- Peter Simmons (Dutch), a telecommunication professional with executive experience in both multinational and Catalan telecommunication companies

I also used background information on Catalan identity and Catalan mediascape obtained during conference participations. Among the professionals I met during the 6th Annual Conference on Catalan Entrepreneurship in Perelada (Spain), were Anton Castells, Minister of Economics, Generalitat of Catalonia, and Mariano Fernandez Enquita, Professor at IEASE in Barcelona.

This research analyzes the growth process of a large Catalan media group Grupo Planeta through the change in ownership (consolidations and acquisitions) that resulted in both technical and structural convergence. In order to explore the concept of interlocalization, this critical case study was guided by several general questions: How does the Catalan minority culture and Spanish media regulations affect Catalan media convergence? Due to power differences, globalization can result in differential advantage and disadvantage for the involved cultures. Premised upon a competitive and free market system, how might a method of “interlocalization”
offer a more equitable relationship for the players of different cultures? Based on value creation and profit maximization, can we observe any evidence for “interlocalization” in the internationalization process of Grupo Planeta?

The case study approached the media conglomerate from the following factors: type of media origin, current language use (Catalan, Castilian, others), geographic relevance (local, regional, national, international), and development of vertical and horizontal convergence.

**Unusual Research Experience Stemming from Media Ownership**

Choosing the right interview candidate is not an easy task, especially in Latin cultures. It happens quite often that company executives do not disclose their direct phone number publicly. Only their inner circle has their direct phone number or a personal E-mail address. Thus, an outsider must contact a high executive through their secretary both in telephone and in E-mail communications. The tendency is even more common in Spanish family-owned companies. Although I am very familiar with such difficulties, my expectation of the procedure in recruiting interviewees differed from the reality of research.

The first unexpected surprise came from the reality of asymmetric information. Apart from the unusual combination of the communication industry (convergence of previously separated industries), Grupo Planeta is a family-owned company that does not have the obligation to disclose internal information such as motivations, goals, or strategies, to the public. Information privacy is mandatory for everyone who works for the corporation. Only the owner himself and the communication director are allowed for interviewing. Thus, I had to come up with adaptation strategies in order to acquire the desired information about Planeta’s merger strategies and intentions regarding to foreign cultures.
Among the adaptations I made was my special persuasion strategy with secretaries, the “guarding” personnel. It is quite unfortunate that the old-ways of secretarial behavior are still widely prominent in Catalonia. Executive secretaries or assistants are expected to be screening barriers for managers: they efficiently regulate the issues and people who can get in touch with their bosses. The screening method is learned through time working with the manager and learning about his/her professional and personal preferences and habits. This quite complicated protocol system serves to protect the scarce time and stressful working days of these executives. Based on my previous work experience, I had to use several “passing” techniques in order to achieve an interview with the right executive in Grupo Planeta. Although my interviewees’ contribution to this research is highly valuable, quite understandably, the executives preferred to remain anonymous. Fortunately, with the help of my executive interviewee, I was allowed to have access some partially published internal material written by the owner, Mr. Lara.

As my company access was rather limited, I decided to pursue two additional ways for gathering information. First, I attended additional events such as conferences (e.g., The 6th Annual Conference on Catalan Entrepreneurship), shows, and gatherings (e.g., 4th of July reception at the American Consulate) that allowed me to network and also to conduct further interviews with experts (Catalan entrepreneurs, and communication practitioners) from the field. These interviews with outsiders aided me to collect data on the perception of Grupo Planeta. Second, additional information such as conference exposés, stories, and comments, also became part of my critical analysis of Grupo Planeta.

My research experience allowed me to learn new elements useful in global research. For scholarly work, I suggest consideration of at least the four factors.
- In order to reach executives and build trust during the limited time of research, the researcher should rely on network connections.

- Creativity is crucial to success in an international environment. One must improvise and include new opportunities to the research agenda.

- The researcher should be able to alternate the planned course and be prepared to change in strategy both in interviews and in the process of information gathering (Lindlof, 1995).

- When choosing qualitative research method, it is important to maintain flexibility in presumptions as new findings can significantly modify the course of research (Lindlof, 1995).

Conducting research in the business environment and trying to learn about company culture and motivations is a complex task for any outsider. Earning managerial trust to gather suitable information is crucial to the success of the research. Moreover, there is a need to understand the external environment the company operates, and its perception in the market and by consumers. In order to reduce information asymmetry, and obtain a less biased picture of company culture, it is also important to gather information from outsiders. Thus, seek the opinion of other professionals who are not directly related to the researched company. In the following section, I provide information about the Catalan mediascape where Grupo Planeta has played a crucial role since the 1990s.

3. Interlocalization in the Globalization Process of Grupo Planeta

Interlocalization is rooted in the quasi-even culture and power relation of participating groups and organizations. As explained in Chapter Two, it can be used as a strategic growth method during the internationalization process of a commercial media company. My study
shows that the company philosophy based on identity of the owner-executive, the organizational
structure and culture, and its merger practices are crucial elements in the globalization process.

The multi-layered identity of a minority nation allows horizontal relations that are not
based on power differences among participants representing various cultures. This minority
identity clearly defines the company mindset through family ownership. The attained
organizational culture and corresponding structure will enable both vertical and horizontal
relations of the units. This horizontal communication will aid the independent development of
the units. Thus, such organizational model can provide culture context for interlocalization as a
globalizing method. This case study argues that based on minority ownership, the Catalan Grupo
Planeta uses interlocalization in the process of media convergence and international expansion.
In order to understand the strategic approach of Grupo Planeta, it is necessary to analyze its
external environment, in particular the Catalan mediascape.

**Family ownership and Convergence: An Overview of the Catalan Media Development**

During the forty years of Franco’s dictatorship (1936-1975) the Spanish media landscape
was highly concentrated and controlled by the Franco regime. This centralized power system and
resulted in media censorship and restrictions to the creation of new media. It also affected the
telecommunication development since strong state control did not allow the creation of private
telephone or cable companies that significantly affected the infrastructure and technological
advancement of the media industry (Herrero, & Sábada, 2006). After Franco’s death in 1975,
“the Spanish media has gone through a continuous changing process, along with the dynamic
changes in the national and international media industry” (de Mateo, 2000). This major political
change –from dictatorship to a democratic monarchy – provided the green light to deregulation
and decentralization during the late 1970s-80s. The crossing of economics and languages with
political border after the entrance to the European Union in 1986, different cultural communities resulted in the “proliferation, superimposition and hybridization of communication spaces (de Moragas et al, 1999, p. 4).

The Spanish Constitution protects the freedom of press, and there is no limitation to the ownership of publications. Even during the Franco regime, the printed press was not centralized and allowed private ownership (de Mateo, 2000). By 2008, there are more than 100 newspapers (some of them regional editions of national newspapers) and over 350 periodicals published in Spain. Most newspapers are published in Spanish, although after the Franco regime it became permissible to publish in ethnic languages. In 2008, people can read books or newspapers in Catalan, Galician, or Basque language (de Mateo, 2000).

In contrast to the print media, the broadcasting industry was tightly controlled and centralized. It is not a surprise that the 1980s are remembered as the “Broadcasting era” in Spain, with the proliferation of television and radio channels, fragmentation of audiences, and globalization/localization of communications (de Moragas et al, 1999). The decentralization of television allowed space for broadcasting both regional (autonomic television and radio) and local levels (urban and small-scale broadcasting, allowing the Spanish version of “proximity television” where the broadcaster and viewer share experiences (de Moragas et al, 1999, p. 4).

The deregulation allowed the entrance of commercial channels to the Spanish market. Channels such as Antenna 3, Telecinco, and later Canal + entered in competition with the public media for large audience and had no interest in a local approach. Only the technological leap of digitalization resulted in the emergence of local broadcasting experience (de Moragas et al, 1999) with the appearance of a larger number of local digital channels.
The change in regulation and privatization became the driving force for the liberalization and reorganization of the convergent industries of telecommunications, cable and television (de Mateo, 2000). The process implied a partial reform of laws and regulations and the setting up of the Telecommunications Market Commission and for new laws, such as the Telecommunications Law (LOT) of 1987, Satellite Telecommunication Law 37 and the Cable telecommunication Law 42 in 1995. Although the previously state-owned Telefonica is still the most important Spanish communication content and telecommunications group, the creation of a second telecommunication operator, Retevision in 1999, broke Telefonica’s long-time monopoly. Both Telefonica and the successor of Retevision, the privately owned ONO are present in mobile and fixed telecommunications, Internet services, digital television and radio, and cable services (de Mateo, 2000). Telefonica was privatized in the late nineties. In fact, in 1999, Telefonica acquired 75 percent of Endemol, the leading European television production company, and –with the aid of the Partido Popular [Popular Party] –Telefonica created a digital satellite platform, Via Digital.

The distribution forms also changed through these deregulations. The first satellite pay television, Canal + was created in 1997. As Herrero (2006) reports, by 2005, Canal+ was absorbed in the creation of a single digital platform, Digital + as Via Digital merged with Canal + (privately-owned Sogecable/Grupo PRISA). The development of the cable distribution and the digital terrestrial television goes through major changes at the first decade of the 21st century. Nevertheless, we can say that by the 1990s, Spain was ready for becoming an information society.

The growing media groups (e.g., Grupo PRISA, Telefonica, Vocento, Grupo Planeta) started to have larger share not only in the Spanish but also in the South-American media
industry and market. Despite three decades of decentralization, the main media carriers and producers are still located in the Spanish capital. Only the sixth commercial television channel, the recently created Sexta, is owned by Catalans and based in Barcelona.

Parallel with the Spanish socio-economic globalizations, local communication also has been developing rapidly in recent years. “Within some nations, such as Wales in Great Britain and Catalonia in Spain, official-language media have been imposed upon minority-language-speaking populations and engendered strong responses to protect regional linguistic autonomy” (Wilkinson, 2002). According to Wirth (2005) there are seven causes that increase the interest in media convergence that includes technological innovation, deregulation and globalization, changes in consumer taste, technological standardization, search for synergy, fear of being left behind and reputation of large corporations, repurposing of old media content for distribution. As this case shows, all of these factors are also present in the Catalan media industry.

There is a greater percentage of large, family-owned companies in Catalonia (Alvarez, 2003). It is true also for the media industry. The Catalan media convergence follows the general patterns of the evolution of mergers and acquisitions, starting with the intermarriage and/or purchase of competing family-owned companies. Through multi-firm consolidations and single-firm acquisitions, larger holding claims the control of the Catalan and Spanish market. Nowadays, we can also observe some tendency to form modest conglomerates.

The Catalan and publishing newspaper industry was innovative and still is highly relevant to the Catalans. Although this printed media is privately owned, it does not turn away from the defense and promotion of Catalan culture. Social responsibility and the defense of Catalan citizens’ voice was always a priority consideration of Catalan public media and had place even in the private media. We consider that the roots of the private media internationalization are found
in this commitment to ethnic/local origin. This commitment and the value originated from civic responsibility create the basics of interlocalization.

Since the mid-1980s there is a strong tendency towards concentration of ownership and content production in the Spanish newspaper industry. By 2000, “Only 20 newspapers control about 70 percent of the total newspaper circulation and about 60 per cent of all these newspapers are owned by regional daily press groups” (de Mateo, 2000). The dynamics of the Catalan press is shown in their attitude towards the digital press. El Periódico de Catalunya (wwwelperiodico.es) and Avui (www.avui.cat) were the first Spanish newspaper with on-line version (since 1995). Moreover, the journalist Vicente Partal started the first exclusively electronic media (www.vilaweb.cat) in 1996 (P. Masip, E-mail communication, November 20, 2006).

Due mostly to historical reasons – freedom of print press and highly controlled broadcasting during the Franco dictatorship – all Catalan media groups originated from commercial print media and count exclusively on family ownership. There are four major groups founded in the Catalan capital, Barcelona: Grupo Planeta, founded by Jose Manuel Lara Hernandez in 1952 as a publishing company (Editorial Planeta) still owned by the Lara family; Grupo Godo, owned by count Javier de Godo, started as newspapers publisher (merger of La Vanguardia and El Mundo Deportivo) in 1998; RBA, a publishing group that was created by R. Rodrigo, C. Balcells, and R. Altarriba, in 1981, and currently owned by the Rodrigo family; and Grupo Zeta: founded in Barcelona, in 1976 by its current owner, Antonio Asensio Pizarro, also originated from the press (Interviu, and El Periodico de Catalunya). All four media groups use both Catalan and Castilian language in the different communication forms. Analyzing Grupo
Planeta, I will give a detailed explanation of the importance of language and Catalan identity in the development of Catalan media.

Table 2 shows a comparative summary of the Catalan media conglomerates, including Grupo Planeta. Most of the data collected from the respective Web-sites and from press accounts collected over five months (October 2006 - February 2007). The table provide and overview of the current status of the Catalan mediascape. I grouped the analyzed the data by the media origin, language used in communication, geographic relevance, digital presence, and other activities or alliances.
<table>
<thead>
<tr>
<th>FACTORS</th>
<th>GRUPO PLANETA</th>
<th>GRUPO GODO</th>
<th>RBA</th>
<th>GRUPO ZETA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Book publisher, Editorial Planeta</td>
<td>Press</td>
<td>Publisher</td>
<td>Press, Interviu, and El Periodico de Catalunya</td>
</tr>
<tr>
<td>Language use in Press or Publishing</td>
<td>Catalan (Avui)</td>
<td>Catalan (Avui)</td>
<td>Mergers (Swiss Edipresse Hynsa/magazins) &amp; Alliances (e.g. Rizzoli-Corriere de la Sera)</td>
<td>Mostly Catalan (El Periodico and other local press)</td>
</tr>
<tr>
<td></td>
<td>Castilian (La Razón )</td>
<td>Castilian (El Mundo Deportivo)</td>
<td>Catalan, Castilian, &amp; other</td>
<td>a few local press in Castilian</td>
</tr>
<tr>
<td>Broadcasting &amp; Audiovisual/Language</td>
<td>Antena 3 (tv) / Castilian digital radio stations in both languages; DePlaneta, leading audiovisual co/bililingual</td>
<td>TV: Td8, Canal Metro, and Catalan DDT/ mostly Catalan</td>
<td>Orbita Max (IMAX producer); BRB (cartoon producer, 50 %)</td>
<td>Smaller TV program production companies (local) / Mostly Catalan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Radio, Union Radio (with Grupo PRISA)/mostly Castilian</td>
<td>Mostly Castilian (for international promotion) or bililingual (Catalan-Castilian)</td>
<td></td>
</tr>
<tr>
<td>Geographic relevance</td>
<td>local, regional, national, international (radio and broadcasting)</td>
<td>local, regional, national, international (mostly publishing)</td>
<td>some regional (in Catalan)</td>
<td>mostly local and regional with some national presence through software products</td>
</tr>
<tr>
<td>Internet presence &amp; Other activities</td>
<td>Internet presence and Webcasting (disparate activities (Vueling Airways))</td>
<td>Internet presence &amp; emerging media (digital editions, Servijob)</td>
<td>Internet presence</td>
<td>Internet presence &amp; Software production</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Advertisement company (Publipress Media)</td>
<td>other alliances (e.g. Hachette Filipacchi)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>joint ventures (e.g. Mattel)</td>
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</tr>
</tbody>
</table>
Masip pointed out that due the low level of English language skill of its inhabitants, Anglo-Saxon globalization is less relevant in Catalonia and in Spain (P. Masip, personal communication, November 20, 2006). Any English broadcast or movie content must be translated to Spanish and, in the local media, to Catalan. While in the 1980s-90s television content was imported mostly from the US, by the late 1990s –2000 Spanish productions gained space. In the last two years though, lot of popular television shows (e.g. House, Two feet under ground, 24) and programs (franchised reality shows) aired by the large commercial channels are originated in the United States. At the same time, the regional Catalan broadcasting (TV3 and Canal 33) strengthens its own production. (P. Masip, personal communication, November 20, 2006)

The Spanish government plans to switch to digital signal in 2010 (Stevenson, & Hamilton, 2006). This change offers both technical and economic advantage: Digital signals occupies roughly one fourth of the space as analog signals, and digitalization provides additional revenue sources (P. Simmons, personal communication, November 28. 2006). Digitalization offers multiplex channels, one standard digital video broadcasting (DVB) and 3 dialects (P. Simmons, personal communication, November 28. 2006) such as DVB Satellite (e.g., the major Spanish company is DIGITAL+), DVB Terrestrial (en example in Catalonia is the city of Mataro that has around 15 main stations broadcasting mostly in Catalan but also in Castilian language), and DVB Cable such as ONO (until their merge, AUNA hold Retevision). This technological advancement will certainly trigger further change in the Catalan mediascape. It is foreseen that this global technology will aid the Spanish media globalization. It is predictable that based on their strong and well-established position, the Catalan media groups will take an active part of this growing internationalization.
Moreover, the centralized power of Madrid is diminishing through the years. Recently, the Catalan government won the battle over Madrid: the Comisión Nacional del Mercado de las Telecomunicaciones (CMT) [National Telecommunication Market Commission], the highest authority regarding telecommunication regulations, moves its center from Madrid to Barcelona. The debate started in 2005, and the discussion ended recently, in November 2006, with the final approval of placing this crucial Commission to Barcelona. It is certain that the Catalan media companies will take advantage form this change.

The implementation of the new dominium “.cat” is another important factor in the Catalan communication industry as it establishes and promotes Catalan cultural identity globally. Dr. Masip explained that at first only institutions connected to the promotion of Catalan culture (schools, public media, editorials) could use the dominium (Masip, E-mail communication, November 20. 2006). Since April 23, 2006, the registration is open to any person or organization that could demonstrate its relation to the promotion of Catalan language and culture. The register Fundació PuntCat, received over ten thousand application just in April 2006. A simple Google search brings up 3.390.000 Web-pages under the dominium of “.cat” (November 2006). Therefore, the cyberspace visibility of this dominium is much larger that others such as ".jobs", ".aero" or ".travel". This increased Catalan presence in the global cyberspace will further internationalize Catalan communities. (P. Masip, E-mail communication, November 20. 2006)

Finally, the Catalan presence is reinforced in the national commercial broadcasting. While the fourth private channel, Cuatro, is owned by the Spanish holding, Grupo PRISA, the new commercial television channel, Sexta, has mostly Catalan ownership (three Catalan companies), including the large Catalan producer, MediaPro, part of Grupo Planeta. This is a
major leap in the globalization of Catalan media production that is spearheaded by an emerging media conglomerate, Grupo Planeta.

**Grupo Planeta, an Emerging Catalan Media Conglomerate**

Grupo Planeta is one of the largest Spanish media conglomerates originated from Catalonia. It has over fifty years of media experience emerging from Editorial Planeta, a book publishing company from Barcelona. Jose Manuel Lara Fernandez founded Editorial Planeta in 1952. Today, it is the seventh largest editorial group in the world with over 5,000 direct employees, and one of the top Spanish content production companies. Apart from publishing in Catalan, it is the largest Spanish language publishing-house in Spain, Portugal, Latin America (Argentina, Chile, Uruguay, Colombia, Venezuela, Ecuador, México), and in the U.S. Hispanic market, counting on over 20 publishing companies worldwide. Grupo Planeta’s strength has grown in the Catalan market since the purchase of Columna Ediciones, a Catalan publisher founded in 1985, that publishes exclusively in Catalan language. The core business of the Group is the publishing, promoting, and marketing of content. The driving force behind their growth is the expansion of content distribution formats: “Planeta's content was the first to appear in multimedia format and is now online and in digital and interactive” (Grupo Planeta, 2006).

The Planeta Group is the leading shareholder in a conservative newspaper, *La Razón*, one of the big six national dailies, published in Madrid. It also maintained its local interest on the so-called “autonomic” (regional) market. At the end of 2004, the conglomerate together with Grupo Godo, participated in the acquisition of the Catalan *Avui*, one of the most popular Catalan newspapers. This indicates their continuing interest in local media development. Its present in diverse regional markets also shows that Grupo Planeta does not follow or get tied to any particular ideology.
In local media promotion, Grupo Planeta and the leading autonomic press throughout Spain (e.g. *Diario de Navarra* [Daily News of Navarra], *La Gaceta Regional de Salamanca* [Regional Gazette of Salamanca], Joly Group, Serra Group, *Heraldo de Aragón* [Aragon Herald], or *La Voz de Galicia* [The Voice of Galicia]) decided to publish a free newspaper with distribution in 14 major cities in Spain: Madrid, Barcelona, Valencia, A Coruna, Bilbao, Castellon, Huesca, Malaga, Palma de Mallorca, Pamplona, Sevilla, Teruel, Vigo y Zaragoza (Grupo Planeta, 2006).

By 2008, the Planeta Group is not only present in print content creation and distribution, it is one of the Spanish leaders in the production and distribution of audiovisual content (filmmaking, documentaries, and children’s programs) under the brand name “DePlaneta” (Grupo Planeta, 2006). Through vertical integration with content producers and distributors of different media forms, they gained worldwide attention in the Spanish speaking market. In recent years Grupo Planeta formed a joint venture, Planeta Junior, with the Munich-based cartoon giant EM.TV AG, for producing and distributing content based on a multi-channel concept (Grupo Planeta, 2006).

On the video market, DePlaneta has a stake in Sociedad Anónima del Video [Video Inc.], one of the biggest Spanish distributors on the video sale and rental market (Grupo Planeta, 2006). Moreover, the company has joined forces with the Catalan production firm, MediaPro (which participates in the new commercial television channel, Sexta) to consolidate the role of their television show producer, Prodigius. This also indicates that the Group keeps developing its strength in the Catalan media landscape.

Convergence and international growth of Grupo Planeta provides a good example for interlocalization even in the context of language use. Their effort in using Catalan language
within Catalonia and Castilian language with local specifics (e.g. dialect) in Spanish territories proves that

the cultural and linguistic dimension gain relevance in the global scene. In a context where homogenization occurs, it produces the parallel phenomena of national cultural revitalization. It is the audiovisual media that holds a key role as cultural vehicle and manifestation. (Crusafon, December 2000)

In the broadcast industry, the Planeta group is represented by both television and radio channels. Their broadcasting interest was particularly aided by some new regulations. In 1999 the Spanish regulation was adapted to the EU Television without Frontiers Directive. The new regulation “forces TV companies to invest 5 per cent of their income in independent production” (de Mateo, 2000).

Soon after the new regulation, Grupo Planeta became one of the leading shareholders in the Antena 3 Group, that includes Antena 3 TV, one of the two leading free-to-air private television networks in Spain, and Onda Cero, the second highest rating Spanish radio station. In October 2003, Antena 3 TV went public and is listed on the Spanish stock market (Grupo Planeta, 2006). It is worthy to mention that until recently, Antena 3 has offered some daily airtime in Catalan language on local news.

Furthermore, Grupo Planeta maintained its interest in the local Catalan market: they own several local radio stations with larger audience such as Rac 1, Cadena Ser, that broadcast in Catalan. They also assumed the ownership of Catalan TV stations such as 8tw in Barcelona that uses exclusively Catalan language. In 2000, the Holding got its digital national radio license and formed the Sociedad de Radio Digital. This facilitates their effort in local radio productions throughout Spain – one of the ways they take advantage of their local media know-how and use an “interlocalization” approach.
Both direct and indirect sales form part of Grupo Planeta’s product distribution. It also takes advantage of the on-line distribution, digitalization, and emerging media (webcasting). Moreover, the Group diversifies its business outside of the media industry with its newest investment in the airlines industry, the acquisition of Vueling Airlines (Grupo Planeta, 2007). Vueling offers cheap flights in Europe. This conglomerate merger opened a new pass to the Group, and might lead a further merger with a current competitor, Clickair (“Las aerolíneas”, 03. 31. 2008). Both airlines rely on digital services and strictly on-line ticketing services (“La Generalitat dice”. 04.09.2008). Thus, they have direct connection with the emerging media industry where Planeta is strengthening its share. In summary, the driving force in Grupo Planeta’s international growth is based on mergers and convergence of media forms. Moreover, Grupo Planeta focuses on the expansion of content distribution formats through diversification.

Product and market diversification forms part of the Group’s strategy. Such diversification is also present in the ways Grupo Planeta deals with national or local cultures. The acceptance of diverse ideologies and cultures should start within the company. As pointed out in Chapter One, the globalization process can change, and ultimately lead to homogenization of cultures. Such homogenizing changes of cultures are based on the domination of a particular national culture represented by global media (Boyd-Barrett, 2006). Chapter Two revealed that with allowing culture equality, interlocalization does not cause such induced homogenization of cultures. Relying on vertical communication, the dynamics of local-global discourse changes. This research aims to search for possible methods of reversing imperialism in media expansion of Grupo Planeta. I contend that recognizing the cultural variety represented by its subsidies leads Grupo Planeta to the use of interlocalization as growth method. As organizational culture
should provide context for interlocalization, I analyze in the following section the role of intercepting identities of the Catalan minority in the organizational culture of the Group.

**Interlocalization Based on Intercepting Identities of a Minority Nation**

In family-owned companies, organizational culture is significantly shaped by the cultural identity of its owners (Fukanawa, 1997; Paul, 2000). In particular, companies owned by members of social minorities tend to be bound to minority cultures and identities. Owned by a Catalan family, the organizational structure and culture of Grupo Planeta is influenced by the minority culture of the Catalan nation. This section aims to reveal those culture identity layers and elements that stem from the Catalan culture and business mentality, and ultimately lead to the interlocalization practices of Grupo Planeta.

Culture is a context that is “formed by an interworked systems of constructable signs” (Geertz, 1973, p.10). It is both the “ideology of a society and the actual, concrete practices that occur in that society” (Wood, 1997, p. 375). Spain is a multicultural society that consists of several minorities and ethnic groups. Thus, it is necessary to pay attention to the comparison of characteristics of two or more cultures, and the interaction among and between different culture groups (Martin & Nakayama, 1999). Emphasizes on the social construction of cultural knowledge and identities (Lindlof & Taylor, 2002) should not be ignored in the study of the Catalan mediascape. In critical interpretivist studies such as this case study on media growth of a minority nation, ethnicity is tied to the underlying power system (Werbner & Modood, 1997). Moreover, the concept of interlocalization is connected to the culture context of identity and power relations.

Identity involves recognition, categorization, self-identification, and dimension relating to associated behaviors, values and traditions (Phinney, 1992). Althusser revisited Gramsci’s
(1971) Marxist approach, and claimed that identity is structured and affected by three major forces: by discourse, by signifying practices, and by economical, political, and cultural forces (Althusser, 1969). Identity is not other but the shaped meaning of social membership. Ethnic identities often result in the relation of hybrid identity, while minority nations tend to preserve their national – although "stateless" – identity (Althusser, 1969). This is the case of the Catalan nation.

The Catalan identity stems from its historical struggle within the multicultural society of Spain. Although the Castilian majority from Madrid rules Spain, the Spanish society consists of several ethnicities (people in Andalucia, Galicia, Navarra, Asturias, Aragon, or the Canary Islands), and minority nations with their distinct language such as the Basques, Galicians, or the Catalans. In 1979, Spain recognized large ethnic communities and minority nations by giving them autonomies. It resulted in positive change in the acceptance and preservation of social ethnic identities.

The Catalan minority was able to preserve its language and cultural identity through the time to modern days although the Catalans could not count on national sovereignty since the 13th century (Trueta, 1946). After centuries of struggle, the Spanish government in 2006 accepted their claim for the denomination as “Catalan nation” (Generalitat de Catalunya, 2006). This recognition of the Catalan culture includes a sense of affirmation, pride, and a positive evaluation of their nation. This long struggle of the Catalans for culture recognition is also related to class and power struggle.

Critical studies count on a large body of research in identity creation and limitations. Identities are influences dialectically by two opposite forces: change or continuity, and stability or tradition (Hall, 1980). Stuart Hall’s critical work on ethnic identity (1980) is based on dual
social power hierarchy, both from class and culture standpoint. According to Hall, minority and ethnic identities are multidimensional constructs and are strongly influenced by social power hierarchies. This majority and minority power system shapes not only social perception but also social identities (S. Hall, 1996). The Catalan people faces with such issues, as the domination of majority cultures was highly prominent and caused major difficulties to the Catalan or Basque minority communities. The fight for Catalan language and national identity, seasoned with the power-struggle between the political-administrative center, Madrid, and the economic center, Barcelona, is still very live today, some thirty years after the end of the Franco era (Balcells & Walker, 1996).

The most difficult times came during Franco’s dictatorship, when Catalan language use was officially banned. According to S. Hall (1980), there is an emphasis on the interrelation among the concept of identity, culture, and communication: identity is cultural that constructed and maintained through communication. Franco focused his policies on the unification of Spanish minorities under the Castilian-speaking sovereignty (Balcells & Walker, 1996). In the 50s and 60s, entire families from Andalucia –Southern part of Spain – were encouraged to move to Catalonia due to its high and fast economic development. As to the language, this migration was easier on the Castilian-speaking newcomers as the Franco regime banned the Catalan language. Due to the oppression of language use, the Catalans put high emphasis on the preservation and promotion of Catalan language used in communication within Catalonia.

Grupo Planeta is a Catalan communication conglomerate with a specific corporate culture and mindset that is strongly influenced by its owner’s personality. Paul defines the corporate mindset as “how the company sees the world and how this affects its action” (2000, p.188). Furthermore, an “organizational mindset can simply be defined as the aggregate mindset of all its
members” weighted by the position they occupy within management (Paul, 2000, p. 198). Consequently, the identity perception and evolution of the president or CEO (chief executive officer) is strongly tied to the company’s culture.

Jose Manuel Lara Hernandez (1914-2003), the founder of Grupo Planeta was an Andaluz immigrant in Barcelona. His son, José Manuel Lara Bosch (Lara), the current President and CEO of the company, was born in Catalonia. His culture heritage relies was influenced by his Andaluz father (Lara) and his Catalan mother (Bosch). Thus, his identity, the phenomenon that emerges from the dialectics between individual and society (Berger & Luckmann, 1966, p. 174), is influenced by various ethnic and national cultures. In fact, Grupo Planeta changed its culture profile when J. M. Lara Bosch took the presidency. With Lara Bosch as President and CEO, the Catalan aspects of the company got reinforced through participation in several Catalan communication companies that uses Catalan language exclusively, such as Group 62 – including Columna Ediciones – in publishing, Avui in press, the Catalan producer, MediaPro, or radio channels Rac 1, Cadena Ser.

In reference to Woodard, Folch-Serra & Nogue Font points out that “language is an element of minority-majority identity struggle. Cultural identity is intermingled with class relations and Catalan language is perceived as a ‘potential weapon of oppression’ by the Castilian-speaking community” (2001, p.161). The notion of Catalans towards language preservation is one of the main elements of their culture identification. The strong desire for language preservation is often subconscious and emotional, rather than conscious and rational (Connor, 1994). In other words, the emotional attitude in defending Catalan language and culture results in some form of Catalan patriotism, or in extremes, claiming separation from Spain. As this paper does not aim to fully analyze the Catalan culture, there is more information on the
Catalan patriotism for example in Llobera’s book (2004) on the “Foundations of national identity: from Catalonia to Europe.” It provides a detailed description of Catalan national identity while defending the cultural reassurance of the Catalans. What is relevant in Grupo Planeta’s internationalization is that the multiple layers of Lara’s culture identity largely influenced the future and the growth strategies of his firm.

In Catalonia, both individuals and companies show layers of Catalan, Spanish, and European identity. This quite typical phrase came from a Catalan executive, Mr. J. Argelaguet: “I am Catalan by birth, European by convictions, and Spanish by law.” It clearly describes how the majority of Catalans recognizes the multiplicity of their cultural ties. These layers of cultural identities directed relate to Heidegger’s concept of multiple identities. In his hermeneutic phenomenology, Heidegger described that identities are multiple facets of a universal self expressed through symbolic interactions (Heidegger, 1962).

Due to his heritage, Jose Manuel Lara Bosch carries these identity layers. While his father was a follower of Franco and the Castilian majority power (although he created a foundation to protect and promote Andaluz culture), J.M. Lara Bosch speaks fluently in Catalan, and he is actively involved with the Catalan social life. He is the President of the prestigious Cercle de’Economia [Economic Circle] in Barcelona, Fira de Barcelona [Barcelona Exhibitions], and the Reial Club Deportiu Espanyol de Barcelona [Royal Spanish Sport Club of Barcelona] and is recognized as Catalan. For his activities promoting Catalan culture and identity, he was offered the Creu de Sant Jordi [the Cross of Saint George], the prestigious Catalan award in 1987. At the same time, he also maintains excellent relations with the Castilian majority in Madrid, fosters the Andaluz foundation established by his father, and counts on extended
networks throughout Europe and South-America (Executive A, personal communication, July 19, 2007).

This multiplicity becomes a fundamental issue of intercepting identities in the creation of company culture in Catalonia (Executive A, personal communication, July 19, 2007). The Catalan multiplicity of identities necessarily contains elements of cultural hybridity that is a “cultural intelligence owing to the advantage of in-betweens, the straddling of two cultures and the consequent ability to negotiate the difference” (Hoogvelt 1997, p.158). Lara particularly relies successfully on such advantage while negotiating his way and his company growth in the complexity of the Spanish social reality.

While the rest of Spain maintained feudal production modes even in the early 20th century, the acceptance of capitalistic modes of production, thus the formation of Catalan bourgeoisie, happened much earlier in Catalonia. As a result, the Catalan entrepreneur started to gain economic power in the early 19th century. Thus, Catalan entrepreneurs hold distinct characteristics than entrepreneur for the Spanish majority or other Spanish minorities (J. Conte, personal communication, July 03, 2007). Spanish entrepreneurs in Madrid represent majority power. As such, they belong to an ideology through political affiliation and party. Being a minority nation, Catalans are first of all nationalist and then they belong to a particular ideology (P. Masip, personal communication, July 02, 1007). The ideological ties in large Spanish media conglomerate are clear. An example is Grupo Prisa. Under the leadership of Berlusconi, the conglomerate follows the international (European) media development model. They openly count on political agreements and party support from the Socialist Party.

In Catalonia, the majority of firms, including Grupo Planeta, are still maintaining the traditional form of a family ownership. Strict cost management, and strong reliance on
negotiations typically characterize family ownership in Catalonia. This tight cost management paired with long traditions of lobbying leads to the Catalan practice of re-investment (J. Conte, personal communication, July 2007). As part of the Catalan business mentality, high percentage of profit is constantly re-invested in the mother company. On the other hand, the well-developed and competent negotiation skill – “making the deal” – became one of the distinctive features of Catalan entrepreneurs. This negotiating skill is very useful in their struggle with the majority power. The Catalan middle class is often reflexive in its claims towards the ruling majority. Executives negotiate for shared power in Madrid. In fact, Grupo Planeta can count on two centers: one in Barcelona where the President lives, and another in Madrid.

The Catalan bourgeois past, and the Catalan identity-based family ownership contribute to the differences between a Spanish and a Catalan entrepreneur. In accordance with J. Conte (Personal communication, July 03, 2007), a Spanish corporation hires competitive professional managers and executives in order to increase shareholders value. The management’s loyalty lies in the profession and not to the company. On the other hand, Catalan entrepreneurs are generational, and gain professional betterment through family experience. Their loyalty is to the head of the family, to the “Padron” [father-owner]. Therefore, for a Catalan entrepreneur, risk diversification does not carry ideological ties to political parties (J. Conte, personal communication, July 03, 2007). This tendency is clearly manifested in the leadership of Grupo Planeta.

Under the leadership of Lara Bosch, the Catalan business view influences Grupo Planeta. As a result of Catalan business mentality, profit often originates from market segmentation rather than power differences. Catalans do not carry colonialist attitude towards other cultures, and they work in other countries respecting local culture traditions. The Catalans takes time to get familiar
with traditions and customs of other cultures, and they are ready to cooperate with their customs. In fact, historically there has never been a Catalan colonialization, and there has not been Catalan cultural imperialism (J. Conte, personal communication, July 03, 2007). The Catalan attitude towards people and business is based on negotiation.

Lara often points out that his company deals with culture products. Thus, Grupo Planeta must recognize and get familiar with the traditions and customs of the inhabitants of its national and regional markets. As Lara expressed, “La industria cultural es muy nacional, e incluso regional. Corresponde a parámetros y hábitos muy ligados a las tradiciones mas propias de cada uno de los países” [The culture industry is very national, more regional. It responds to parameters and customs that are strongly tied to country-specific traditions.] (Lara Bosch, 2002, p. 5).

While the Castilian majority in Madrid promotes cultural imperialism of the Spaniards, the Catalans try to sustain their cultural identity (Masip, personal communication, July 2007). The Castilian managers only aim for economic gain while the Catalan entrepreneur also promotes its Catalan culture and identity. As a result, Catalan media companies – following Catalan tradition – tend to lock in local government subsidies for the cultural content in public interest. The Generalitat offers incentives to those companies that promote Catalan language and culture such as translating press articles to Catalan (e.g. according to J. Conte, El Periodico de Catalunya uses such service). They also subsidize Catalan movies, books in Catalan or about Catalunya, or material for language causes (Generalitat de Catalunya, 2006).

In fact, the Catalan model of media development differs from the Anglo-Saxon, German, or French media growth model. Being a minority nation, the Catalan government, the Generalitat, is considered as the embodiment of Catalan identity, and it plays an important role in
the development of Catalan commercial media. Just as Colliers (1998) describes expanding
Heidegger’s approach: the multiple identities in Catalonia are shaped and structured in a socio-
political context while constructed institutionally. In general, public media has a less significance
role in the commercial media growth in Europe. Due to the promotion of Catalan culture and
identity, the Catalan commercial media growth is directly tied to the Generalitat.

These ties between Catalan companies and the Catalan authorities are constantly renewed
and reassured. Catalan companies often organize conferences, or networking events, together
with the Generalitat. There are organizations, subsidized by the Generalitat, that promote Catalan
companies on abroad such as COPCA [Consortium for Commercial Promotion of Catalonia], or
the Camara de Comercio [trade centers] in every large city in Catalonia. Industrial organizations
such as Fegmetall [Association of Metallurgical Companies in Girona County], Association of
Textile producers, etc. can also count on financial and/or administrative support from the
Generalitat. Catalan entrepreneurs often consult with the Generalitat when organizing larger
missions outside from Catalonia – an example was the Catalan presence at the Frankfurt

Regardless of the political components of the ruling Generalitat, the Catalan
entrepreneurs can count on the support of its authorities. The 6th Annual Conference on Catalan
Entrepreneurship in summer 2007 provides an example to such support. Conference participant
Anton Castells, the Catalan Minister of Economics, put emphasis on the dialectics of identities in
minority nations in his exposé (July 2007). These ties are mostly lack of political or ideological
affiliation. Castells expose reflected the Catalan entrepreneur mentality and their relation to
political leadership.
While Castells reassured firm attitude in negotiating Catalonia’s role in Spain, he promised that the Generalitat would negotiate Catalonia’s interest within the Spanish growth and well-being. He also put emphasis on self-confident governing. It is well known that there is a need for simplified administrative and fiscal procedures that facilitates short circuits and automatic simplification of procedures and licenses (including audiovisual media licenses). Thus, Castells called for cooperation between the Generalitat and private sector: social leadership on one hand, and self-confident entrepreneurship and company leadership on the other. Castells expose not only represent the ties between the Catalan companies and the Generalitat but it is also a clear indicator of the Catalan value system.

Catalan entrepreneurs find their cultural and social values highly desirable. Catalan media companies find additional values in this Catalan romanticism (Conte, personal communication, July 2007). The Catalan communication companies are private properties of prominent Catalan families. As such, they refrain from disclosing personal information on members of the Catalan society. The lack of “gossip column” in the Catalan press is one of the aspects of the Catalan values (Conte, personal communication, July 03, 2007). As negotiation is part of these Catalan values, Catalan companies tend to not interfere with local cultures. Lara also follows such tradition in its relation to other cultures while strengthening local – including Catalan – media (Conte, personal communication, July 03 2007).

According to the tendency observed in my research, Grupo Planeta has shown a new way of expansion by acquiring other sub-national, or regionally-minded media. Its practices show uneven patterns of global processes that “are enacted through cultural practices produced by the transnational flows of images and capital” (Shome, & Hedge, 2002, p. 172). This approach seems to be successful because it allows the acquired company to retain its culturally
idiosyncratic character. Such Catalan attitude is originated from long history of struggle for culture preservation, as they are minority within a national framework. The Catalan minority status and well-known ability for negotiation inspires trust in these regional or local companies, and carry more credibility for the acquired company. Thus, the acquisition of a sub-national firm by the Catalan minority-owned company can result in smoother post-merger transition.

Since the Catalan company does not contain colonialization patterns, or "Global programming library" to impose on the acquired company, there are social and cultural benefits as a bi-product of the mergers. The promoted content can still be locally determined. So for example, if the Catalan company buys a company in Wales, it does not look a like "A Spanish company bought a British company", but rather like "Catalan company merged forces with a Welsh company." The Catalan model allows the sub-culture to continue to survive rather than being subsumed into the national and global media homogenization process.

Part of its diversification process, Grupo Planeta started to add strongly Catalan element through strictly Catalan communication media such as Avui, Cadena Ser, 8tw, or Rac1. Similarly to other Catalan media companies, the current Grupo Planeta does not count on any political affiliation. The Group sustains and promotes the cultural and not the political affiliation of its subsidies. I tend to agree with Keshishian (2005) that although culture and communication are socially constructed and reinforced, they also contain power relations rooted in the means and form of production. The examination of the horizontal and vertical integrations of Grupo Planeta can unfold the role and impact of interlocalization in their strategic approach.

Overall, Grupo Planeta is profit-driven, with special focus on cultural entrepreneurship. Although it was founded with the support of Franco, it is considered a Catalan media conglomerate by now. The organizational structure and company culture significantly changed
under the leadership of Lara Bosch. The next section examines the organizational model and culture of the Group.

**Strategic Change in Grupo Planeta: Organizational Model as Context for Interlocalization**

There is clear connection between communication and organization. This connection determines their relationship and how they influence each other (Reed, 1996). According to Trompenaars and Woolliams (2003), there are four stereotypes of corporate culture: The Incubator, The Guided Missile, The Family Culture, and The Eiffel Tower Culture. Grupo Planeta is a family-owned company. Therefore, it would seem rather natural if its organizational model could correspond to the Family Culture model. Trompenaars and Woolliams, (2003) employs, that the Family Culture model “is characterised by a high degree of centralisation and a low degree of formalisation. It generally reflects a highly personalised organisation and is predominantly power oriented” (p. 366). Surprisingly, this research – both the interviews and the researched material – indicates that the organization model used in Grupo Planeta is closer to the Guided Missile model. Nevertheless, in order to fully identify the Group’s organizational culture, there is a need for further research.

The Guided Missile model describes the company as a “loose structure of interrelated departments: a large number of interacting task and project oriented small units” (Trompenaars & Woolliams, 2003, p. 365). There is still a central power but the independence of the units is large, and the communication among units and departments is not only to or through the center but among each other as well. According to Trompenaars and Woolliams, the main characteristics of such organization are task orientation, power of knowledge/expertise, commitment to (tasks), management by objectives, and pay for performance, where the “manager is a team leader… in whose hands lie absolute authority” (2003, p. 365). The
decentralized organizational model can provide the necessary framework for interlocalization. Figure 3 gives a visual interpretation to the Guided Missile organizational structure.

**Figure 3. The Guided Missile Organizational Model**

Although Grupo Planeta is a family business, and the role of the Lara is predominant, I observed that with the last two decades’ fast growth and convergence process, the company chose the Guided Missile organizational model. In accordance with Trompenaars and Woolliams model (2003) description, “‘Getting the job done’ with ‘The right man in the right place’ are favorite expressions” in companies that opt for the Guided Missile model (p. 365). These slogans are clearly present in Planeta’s company culture.

On the company Web-site, Grupo Planeta discloses its goals and objectives. They claim that their organization is a “complex action-oriented group based on participatory management and provided with clear firm structures and procedures” (Grupo Planeta, 2007). As my executive interviewees explained, achievement and effectiveness are weighted above the demands of authority, procedures, or people (Personal communication, July 19, 2007). The company allows the units and departments to concentrate on their task and actions and enables them to communicate both vertically and horizontally. The vertical communication includes bottom-up participatory communication, while the horizontal information flow among departments and
business units is not ruled by strict and centralized power structure. Further reference of their task-orientated structure is provided by their image: “Our products establish us a group which offers prestigious brands. As a leader in content our philosophy is based on respecting the character and development of each brand.” It is within reason to consider that the company culture of Grupo Planeta is a task and project oriented rational culture. This company structure and culture serve as an enabling context for the use of interlocalization.

The leading philosophy of the company corresponds with the Laras’ multicultural identity. The well-known slogan of the founder Lara “We should not mistake the catalogue with the library,” is a good indicator of the company philosophy (Executive A, personal communication, July 19, 2007). According to the meaning of the slogan, the company offers a context and managerial space for different ideas in order to develop profitable businesses. The independence of units provided by the task-orientated structure of the Guided Missile model enables such business mentality.

As stated earlier, Grupo Planeta as conglomerate does not rely on or promote a particular ideology or a defined national culture. Rather, it aims to offer varied and diversified content for diverse taste and culture (Executive A, personal communication, July 19, 2007). Such approach allows cross-cultural mediation and participatory decision-making process within the Group. The merger of the Group with a Columbian communication company in 2007 is a good representation of Lara’s philosophy and his company’s culture.

In the interview regarding to the acquisition of the Columbian Publishing House “El Tiempo” (CEET) by Grupo Planeta

“Lara resaltó que su grupo no va a cambiar nada en El Tiempo y que su intención es que las decisiones que se tomen sean "de Colombia y en Colombia" y que si algo se tiene que cambiar será decidido por los responsables directivos de la CEET.”
[Lara pointed out that his group will not change anything in “El Tiempo”, and he intends to leave decisions “about Colombians in Columbia”. If something needs to be changed it should be decided by the corresponding managers of CEET] (El Periodico, 09. 17. 2007).

Obviously, Mr. Lara put emphasis on his intention to leave any future decisions in the hands of local managers at CEET. In accordance with his managerial philosophy about local expertise, he believes that all the decisions should be made on the local level (Executive A, personal communication, July 19, 2007). With such strategy, the Group does not force the use of Spanish or Catalan content on foreign – in this case, Columbian – audience. Providing authority to each unit and allowing them to develop their own market indicates the autonomy of the subsidies in the Group. This type of culture relation within the company might allow the use of interlocalization as globalization method.

This merger with El Tiempo also indicates that their globalization approach differs form other models common in large media conglomerates. Neither national nor in foreign mergers, the acquired company does not loose its autonomy and ideology. The newly joined company continues creating content for its previous markets in accordance with the culture-specific needs of its market. Culture and power relations are not vertical in such case. Therefore, it is reasonable to say that Grupo Planeta uses Focus strategy (Porter, 1980).

Porter (1980) defined three major strategies in order to achieve higher market share within the industry. Cost leadership strategy is based on broad target and uses parity or proximity in aiming to achieve low cost (Porter, 1980). Such reliance on economies of scale would rather fit with the hegemonic form of globalization. On the other hand, Differentiation competitive strategy still focuses on broad consumer base although it aims uniqueness in its offers in order to differentiate the company’s products from its competitors (Porter, 1980). According to Porter (1980), when choosing Differentiation strategy, companies tend to concentrate on some special
attributes of the product or service that are perceived as important by the buyers who are ready to award this uniqueness with premium price. Thus, Differentiation strategy used in an international context can result in glocalization. As Grupo Planeta targets special segments of the market with sub optimization based on a narrow scope of activities, their strategy better describes the Focus strategy. Thus, the globalization process of Grupo Planeta can be based on interlocalization that is further facilitated by its company structure and merger practices.

Merger and Acquisition Practices that Enable Interlocalization in Grupo Planeta

Following Wind (1998), Wong (2000, p. 156) argues the meaning of a global company: “There are companies that are part global, part regional or part local involving different domains such as portfolio, supply chain, research and development and business processes. In terms of mode of business practices, there could be independent operations, joint venture or alliances” (Khondker, 2004). Grupo Planeta maintained its multiple foci through the years. Further, becoming a conglomerate, they even strengthened their interest in local markets while expanding the range of their communication domain internationally.

Grupo Planeta, under the leadership of Lara Bosch, shifted focus in the late 1990s. Lara decided to become a mediator between the creative media world and the public using different communication forms (Executive A, personal communication, July 19, 2007). Using convergence, they started to expand their reach from publishing to the different forms of media communications. Originally, the delivering form was the published book. Since 1995, Lara proposed to engage with all the distinct delivering forms of media communication such as films, press, radio, and electronic forms, including e-commerce (Grupo Planeta, 2007). As the company growth of Grupo Planeta is based on reinvestment strategy – a quite typical managerial approach in Catalan entrepreneurship – the company heavily relies on convergence with media producers
and distributors. For cost efficiency, Lara turned to mergers and acquisitions. In its merger strategy, Grupo Planeta mostly opts for acquisition based on the slogan is “Work for Win-to-Win Situation” (Grupo Planeta, 2007). Lara clearly expressed his view on such type of merger when stating that a “merger not a personal battle” (Lara Bosch, 2002).

Grupo Planeta pays special attention to culture elements of the new markets when choosing its mergers. As it is expressed in the Annual report, 2006, “After over half a century always close to our public, the business success of Grupo Planeta is due to its proximity to people” (p. 6). The reasoning behind is clearly indicated by Lara when he compares culture with professional learning in his analysis of the internationalization of his publishing sector:

Es muy difícil internacionalizar el producto cultural….Es muy, muy difícil que un español con profundos conocimientos de los procesos de edición se convierta en un tiempo prudente en un buen editor polaco. Precisamente la dificultad estriba mas en conocer lo que quieren los polacos y encontrar los libros adecuados que en aprender a hacer un libro.
Por otro lado, es muy complicado que un director comercial español aprenda en un tiempo razonable a dirigir un red de ventas checa. La barrera idiomática y las diferencias idiosincrasias hace que sea más difícil el aprender a gestionar vendedores checos que aprender lo que es una red comercial.

[The internationalization of a culture product is very difficult...It is very, very difficult that a Spanish publishing professional learn to be a good Polish editor within a reasonable time period. In particular, the difficulty lies in the figuring out what the Polish people want, and in finding the suitable books for them. Learning about the publishing processes of a book is not the problem.
On the other hand, learning in reasonable time period how to manage a Czech sales network is a very complicated task for a Spanish commercial director. Language barriers and idiosyncratic differences make the management of Czech salesman far more complicated than learn commercial sales force management.] (Lara Bosch, 2002, pp. 4-5)

Lara’s discourse indicates that he acknowledges national culture differences, and is ready to cope with such differences. Instead of changing other cultures with distributing the products of his own cultures, he wants to learn about these cultures so he can offer products from within the culture. Doing so, most of the international acquisition of Grupo Planeta is based on market
diversification and not on economics of scale of its content distribution. When Grupo Planeta uses Focus strategy and enters to local media markets, they encounter far less competition. Counting on large share of these local markets, it may influence prices, costs, and investment. This approach reflects the twin themes in Lara’s philosophy: profitability and cultural entrepreneurship (Lara Bosch, 2002). Both elements are present when undertaking mergers with foreign companies. Such approach also enables the company to use interlocalization as method while expanding towards foreign markets.

The motivations, when undertaking a merger search, lie in six major factors (Balling, 1993). According to Balling, the internal factors are defined by the general character of the new firm, the level of its production technology, and the degree of adaptability and expandability of its structure, while the external factors include present and potential size of market demand, production process & technology, and the reduction of competition and higher market control (1993).

When internationalizing, the company must decide the geographic focus of its acquisitions. Grupo Planeta is also faced with the twin questions of the Spanish media internationalization: What is the scale and weight of the outer markets, and whether Spain is interested in this external promotion. It translates to geographical focus and investment capacity. As P. Masip (Personal communication, July 2007) explained, language and socio-cultural proximity combined with issues of economics of scale – how much capital the company should invest – causes significant changes in the Spanish and Catalan local-global model. Due to language and culture proximity, the preferred location of investment from Spain is in South America.
Galan, Gonzalez-Benito, & Zuñiga-Vincente (2008) examined the factors that determine the location decisions of foreign direct investment (FDI) in Spanish multinational enterprises (MNE). In general, their “results suggest that, apart from infrastructure and technological factors in EU countries and social and cultural factors and cost factors in Latin American countries, there is no other group of factors with such a highly significant influence on the FDI location decisions of Spanish MNE managers” (Galan, Gonzalez-Benito, & Zuñiga-Vincente, 2008, p. 990). Interestingly though, there is plenty room for private investment in the Hispanic media industry as the Spanish mass media is still mostly public with not much interest in going international (Masip, personal communication, July 2007). Thus, it is not surprising that Grupo Planeta decided to undertake its first media acquisition in Columbia when merging with the group “El Tiempo” (“El Grupo Planeta,” 09. 17. 2007).

Although Grupo Planeta established its publishing subsidies in several South-American markets such as Argentina, Brazil, Chile, Columbia, or Ecuador, they do not anticipate significant growth on these markets due to the slow growth of readership (Executive B, personal communication, July 13, 2008). According to J. Conte, the written media such as publishing, or the press, is still luxury products in most South-American countries (Personal communication, July 2007). In addition to the emerging nature of the Hispanic media market, South-America deals with large number of analphabetism. Similarly to other developing regions, this significant analphabetism causes the press fall far behind the importance of television or radio. These factors, added to technological concerns, greatly influences Lara’s decision regarding the international growth process of his company.

In his work on the internationalization of the publishing sector, Lara explains that technological learning is not a viable option for mass media communication (Lara Bosch, 2002).
The media communication technology used by his companies is more advanced than in most Latin-American countries, reinforcing the competitive advantage (portor, 1980) of Grupo Planeta. On the other hand, the technology used in the Group often falls behind their West-European (English, French, Italian, or German) competitors (Lara Bosch, 2002). Thus, it diminishes the obtainable competitive advantage in the European markets.

Due to the afore-mentioned factors of analphabetism and low level of technological advancement in South-America, Lara targeted further media internationalization of his Group towards non-Hispanic language countries in East-Europe of Asia (Lara Bosch, 2002). The maturity of the large West-European markets also contributes to Lara’s choices and geographical focus. The high level of competition in West Europe results in low profit margins and higher risk (Lara Bosch, 2002). Nevertheless, Lara (2002) maintains some interest in smaller regional and local South-American companies as they offer an excellent opportunity for content form diversification and for engagement with the Hispanic audiovisual market.

In future growth, Grupo Planeta prefers FDI in emerging markets in its non-Spanish cross-border investment: in the local markets of Central-East-Europe on the short run, and in Asia on the long run (Executive A, personal communication, July 19, 2008). In these emerging markets, there is little interest from large media conglomerates. Thus, there is less probability for new competitor entry in these local markets. It also means that the threat for substitution is also lower. Relying on the expertise and maintaining the leadership of specialized local/regional media reduces the possibility for substitution as the programming considers local interest and needs.

Although they mostly focus on diversification, part of these acquisitions also provided Grupo Planeta a good use of economics of scale (Green, 1990) in distribution. A recent example
is the Spanish Civil War videogame sales during Christmas, 2007. The game was offered as additional product with the sales of book collections in Spain, Portugal, France, or Russia (Barnet, 10. 30. 2007). It indicates that the Group does not always rely on interlocalization but also uses other globalization methods. Nevertheless, most of Planeta’s mergers with local communication companies are based on geographical and product market diversification (Green, 1990) and results in large number of brands.

Our position of leadership has become consolidated not only as a business corporation but also in each of the sectors in which over sixty brands that represent the different businesses run within the Group operate. (Annual Report, 2006, p. 1)

Such content diversification is not typical in large media conglomerates that mostly rely on economies of scale in media content distribution. Such market diversification distinguishes Grupo Planeta from other communication conglomerates. It also indicates the Group’s distinct view on growth and globalization.

Based on low cost and risk adverse mergers, their diversification strategy successfully serves the company’s growth. As Lara clearly explains, the basics of their internationalization process consist of six managerial and organizational rules (Lara Bosch, 2002, p. 7.) such as

- Larger profit margins
- Creation of local communication centers
- Form and strengthen local management
- Creation of flexible structures to induce market flexibility considering internal consumption and product cycles
- Monetary balance of foreign currency in order to reduce risk of exchange

These factors underline the Group’s emphasis on local media development and flexible reaction to market changes. It indicates that culture proximity and not power-based culture hegemony lies
in the center of the company’s growth. Understanding the importance of culture in content creation, Lara claims that

“La industria cultural es muy nacional, e incluso regional...[Pues] es muy difícil internacionalizar el producto cultural”

[The culture industry is very national, and even regional...{Thus}, it is very difficult to internationalize a culture product] (Lara Bosch, 2002, p. 5.).

Recognizing the cultural factor, Grupo Planeta is not ready to interfere with local culture interest through forced distribution of any content created or owned by the Group. They do not advocate for global content, or content distribution through economies of scale so typical in large media conglomerates. Learned through minority struggle, the group intends to honor cultural differences of its audience and its subsidies. By using conglomerate channels, the created diverse content can be shared by anyone (consumer or subsidies) who wishes to obtain it. Such non-discriminatory practices avoid hegemony in the Group’s internationalization. Thus, it also indicates that Grupo Planeta uses interlocalization and not glocalization in their foreign markets.

On the other hand, creation of niche market subsidies is profitable from the cost perspectives as well. Acquiring smaller companies in developing countries does not interest large media conglomerates from the US, UK, France, or Germany. There is thin competition in these markets. Planeta’s size, good reputation, and business success enables the Group to merge with these local and regional companies on low cost. This lower cost also strengthens their Focus strategy approach in the international media market and leads to higher profitability.

Furthermore, the Catalan minority media groups learn how to lock into local government subsidies for the "cultural" content in the public interest (Folch- Serra & Nogue-Font, 2001). In its niche marketing and Focus strategy approach (Porter, 1980), Grupo Planeta can tap into financial aid and grants from local governments. The historical ties of Catalan entrepreneurs to
the local authorities provided Planeta with suitable know-how method for acquiring aid from
local governments. The ruling philosophy of profitability and cultural entrepreneurship of Lara
facilitates his company’s ties to public service, and the cultural sensitivity of the Group.

Cultural sensitivity (Earley, & Peterson, 2004) plays an important role in business
communication across cultural boundaries. It interfaces with the creation of trust among
interacting business partners. The culture sensitivity of Grupo Planeta originates from its roots as
publishing company. Lara’s statement explains how this publishing background shaped the
cultural view of his company:

“Creo que todo ello [la escasa internacionalización de las empresas editorial europeas] se debe
que el libro y todo su entorno corresponden a una área muy íntima y personal del consumo
de los habitantes de cada país, cuyos hábitos vienen muy marcados por sus tradiciones y
costumbres, y que crean una área de interés, un tipo de literatura o de libros de no ficción
y unos temas propios de cada uno de ello, que es muy difícil diseñar o crear desde otros países”

[I believe that all of this {the low grade of internationalization of the European publishing
companies} is due to the fact that books and their environment form a very intimate and
personal part of consumption specifically characterized by the inhabitants of each
country. Consumer choices are deeply embedded in traditions and customs, as each
culture creates a field of interest, a type of literature or non-fiction, and it deals with
subjects and themes that are particular to that culture. Thus, they are very difficult to
design or create from another country.] (Lara Bosch, 2002, p. 5.)

This recognition and acceptance of cultural values in consumer choice facilitated Grupo
Planeta’s adaptation to the cultural diversity of its audience. In addition, experience in minority
struggle and the reinforced Catalan identity of Lara Bosch induced his culturally sensitive view
on media convergence. Consequently, the mergers and acquisition in the last decade allowed
Grupo Planeta to rely on horizontal cultural relations among its companies. Overall, Lara
recognizes that cultural sensitivity should be present both in busines to busines relations and with
customers.
Fit with the Guided Missile organization model, Grupo Planeta can be described as “Orchestra of cultures” where “each culture plays a distinct note in the chorus of the collective social existence and where people's individual voices can be found and heard” (Lum, 1996, p. 113). In order to maintain such diversity of cultures and ideologies, Grupo Planeta must control all its subsidies and alliances.

Lara learns from his past mistakes and follows a key motto: “Being the owner of the highway not just the vehicles” (Executive A, Personal communication, July 18, 2007). A good example is the case of Tele5 and Antenna 3, the two major commercial television channels in Spain, destined to generalist audience. In the late 1990, Grupo Planeta purchased only 10 per cent of the shares. Consequently, they had to share control with other shareholder organizations. In such circumstance the decision making process was very slow and often resulted in unsustainable solutions (Garcia de la Granja, 2005). Later, selling his part in Tele5 and obtaining majority control in Antenna 3, Lara decided firmly for future merger strategies. His company would not participate in any form of merger unless they can purchase the controlling majority of shares (Executive A, personal communication, July 18, 2007). His managers need to take the lead and be in control of their units. This leads to the question of managerial approach in Grupo Planeta.

**Diversification and Culture in Grupo Planeta's Managerial Approach**

Grupo Planeta recognizes the importance of their employees. Bottom-up and participatory communication (Melkote & Steeves, 2001) is an integral part of their corporate culture. As it is pointed out on the Web-site:

“Grupo Planeta's strength lies in its people. Therefore we are committed to their continuous personal and professional development. We also recognize and value their
contribution to the company and encourage their input in decision making processes.”
(Grupo Planeta, 2007)

This people-orientated approach is also reflected in their merger choices. As indicated on the Web-site, Grupo Planeta (2007) establishes “the best strategic alliances for the development of new business,” and often opts for joint ventures. According to Kogut & Singh, “Joint ventures are vehicles by which to share complementary but distinct knowledge which could not otherwise be shared or to coordinate a limited set of activities to influence the competitive positioning of the firm” (1988, p. 412). In international mergers of media companies this distinct knowledge also contains important cultural information that the newly joined subsidy can offer to the corporation. Moreover, local groups might represent ethnic and minority cultures that should be considered by a multinational media group. Dealing with culturally relevant products and services, this intra-national diversity should be also included in the management practices of multinational media conglomerates. They should deal with ethnic communities and minority nations as well.

The first successful merger occurred in 1984. Grupo Planeta merged with Agostini, a large Italian publisher that was a leader in its industry. They formed a joint venture, Planeta Agostini, with 50-50 percent exchange of share. This merger allowed risk aversion and reduction, and the creation of new opportunities, including geographical diversification (Executive A, Personal communication, July 19, 2007). The focus of the new company still lay within the publishing industry but with more strength in the international (mostly Hispanic and Portuguese) markets. In April 2008, Grupo Planeta confirmed its interest of buying Editis, France's second largest publishing group. Planeta explained in an interview “that it would
preserve the integrity of Editis and would keep its current management, led by Alain Kouck”
(Tedesco, 4. 21. 2008).

Today, Grupo Planeta is owned by a minority background multicultural individual, Jose
Manuel Lara Bosch. Thus, the company has strong ties to minority or ethnic cultures. Analysing
the publishing industry, Lara wrote:

“En nuestro proceso industrial existe la figura capital del editor, el creador y diseñador
de un producto. Debe ser una persona con capacidad suficiente para gestionar y que
tenga la visión de cómo debe ser un libro, un producto; todo el conocimiento que ello
conlleva es difícil de adquirir sin haber vivido inmerso en los hábitos de los lectores
locales y del país.”

[In our industry, the central figure of success is the publisher, the product creator and
designer. It must be a person who has enough management capacity, and possesses the
vision of how a book, the product should be; it is difficult to obtain all that knowledge
without emerging in the local culture of that country, the customs and traditions of the
local readers.] (Lara Bosch, 2002, p. 5.)

Lara not only recognizes the vital importance of culture in consumer taste but also learnt how to
capitalize on culture knowledge within the communication industry. In his view, the focus is not
on distribution of product of a certain culture but satisfying local consumer needs and taste. As
suggested by previous Catalan research such as Crusafon (December 2000) and Folch-Serra &
Nogue-Font (2001), some minority-owned media conglomerates can become experts of how to
manage minority and local media. Local cultural knowledge-based niche media became a
profitable business for Grupo Planeta. Grupo Planeta also learnt that this experience-based know-
how can be transferred to different culture environments (Lara Bosch, 2002). Lara’s philosophy
strengthens the transfer of managerial knowledge in order to increase profitability.

Management practices of Grupo Planeta show the element of crossvergence (Ralston,
Gustafson, Cheung, & Terpstra, 1993) that is particularly useful in the internationalization of
minority-owned corporations. International management faces with four categories of macro-
level influences: sociocultural, economic, political and technological. According to researchers Ralston et al (1993) the “combination of sociocultural influences and business ideology influences is the driving force that precipitates the development of new and unique values systems among individuals in a society owing to the dynamic interaction of these influences” (Witt, 2008, p. 47).

While recognizing such influences, Lara advocates the need for culturally skilled employees. These managers and employees are considered as key components in Grupo Planeta’s participation in the international business arena (Lara, 2002). No culture or ideology is in privileged position in this company. Such balance and recognition of the importance of cross-cultural differences is a clue factor in Grupo Planeta’s success. The lack of power hierarchy of cultures gives space for interlocalization as globalization method of the Group.

Lara’s managerial approach can certainly be successful. According to research conducted by Carol Kovich on group effectiveness, cross-cultural teams can be highly efficient. Grupo Planeta’s business success proves that they rely on a highly efficient cross-cultural management. Grupo Planeta clearly recognizes that cross-cultural communication is about learning (Grupo Planeta, 2007; Lara Bosch, 2002)
In practice, Lara (2002) puts emphasis on the importance of training of young managers from the country of origin. He considers that professional know-how should be paired up with local knowledge. He aims to merge his company’s professional experience-based know-how with local managerial and culture knowledge of product selection and distribution. For example, the publishing mother company (e.g. Planeta Agostini) can provide publishing process know-how through training. But there is a need for local managers well versed in the local culture, so they would understand local language, and local consumer taste while choosing the right product and form for their audience (Lara Bosch, 2002). Therefore, the media content is not glocalized, or adjusted to local needs. It is only the basic managerial techniques and tools that are shared within the corporation. Thus, I argue that Grupo Planeta directly influences local cultures through media content.
According to Lara (2002), decision-making ownership is vital in any merger or acquisition in order to implement company philosophy and make timely decisions. Learning from past mistakes, Lara advocates that the best approach in coping with risk factor is “learning by doing” (Garcia de la Granja, 2005). As such, he learns form his experience in his past adventure with Tele5, the failed merger with one of the first Spanish commercial television channel in the 1990s. He recognized that decision-making ownership is vital in joint ventures and acquisitions in order to implement their unique company philosophy.

From the failure with Tele5 he also learned that his company should turn towards the electric forms of content delivery (e.g., electronic books, 29.com), and TDT (Executive A, personal communication, July 19, 2007). After getting hold in the different forms of media communication, the future challenge of the company lies in the internationalization of diversification (Executive A, personal communication, July 19, 2007). In the 21st century, such international diversification cannot be separated from technological advancement.

**Conclusion**

Interlocalization defines a domination-free interconnectedness of two or more cultures in an international context. Grupo Planeta not only allows but also promotes local and regional cultures through its Spanish and foreign subsidies. Through influencing organizational structure and culture, family ownership and layered cultural identity of its owner, Jose Manuel Lara Bosch, plays crucial role in the strategic choices of the Group. In particular, Catalan culture identity and Catalan minority nation status significantly shape the conglomerate’s practices in its mergers and acquisitions. As a result, the Grupo Planeta opts for accepting ideological and culture diversity within its organization. Thus, they leave content creation and promotion practices to the subsidies. With such recognition and acceptance of cultural differences, Grupo
Planeta does not promote any particular national or minority culture worldwide. Instead, they enhance the success of its subsidies on their own local and regional markets. They apply interlocalization as growth method in their international expansion.

Interlocalization should not be measured only by the intentions and strategic decisions of a company. It is important to analyze post-merger product changes and consumer reactions to culture elements conveyed by the subsidies. One of the limitations of this study is that it does not address possible post-merger content changes neither identify audience reactions to such changes. As its merger with El Tiempo Group happened just recently in 2007, more time is necessary in order to measure content change and its effect on the audience. Further studies should be conducted in a year or two that would measure consumer opinions and the ways in which local culture is affected by such mergers.

As a result of interlocalization, participants of such processes “navigate the turbulence of cross-cultural dynamics in order to co-create a constructive future together with cultural others.” (LeBaron, & Pillay, 2007, p. 58). Grupo Planeta desires to create such dynamics:

“Today Grupo Planeta projects itself in culture, information, audiovisual entertainment and training, with products and services that satisfy new needs and exigent demands. The desire for success in our close relationship with people is what best defines us and unites us today as Grupo Planeta.”(Annual Report, 2006, p. 1)

Chapter Four approximates interlocalization from another angle. The Open Society Institute’s longitudinal international projects, the “Roma Initiative” and its successor, the “Decade of Roma Inclusion,” provide examples for new forms of globalization. The case study analyzes the presence of interlocalization as globalization tool in international development projects.
CHAPTER IV

INTERLOCALIZATION AS TOOL IN THE EMPOWERMENT PARADIGM:
A STUDY OF THE OPEN SOCIETY INSTITUTE’S ROMA PROJECTS

During the last two decades the conceptual framework for international development has changed. In particular, the understanding of development communication has undergone a major paradigm shift. The earlier view, based on hard economic indicators such as economic growth and Western-type modernization, had been long criticized. Relying on Marxist ideology (Frank, 1969; Portes, 1974) and on the basic need approach (Grant, 1978; Streeten, 1979), critical development communication scholars started to look into socio-economic change not only from a materialistic but also from a structural standpoint of view (Huesca, 2003). Incorporation of some postmodern theories to critical view, such as feminism, environmentalism, and subaltern research influenced a major shift in the long-held views on Third World development (Mody, 2003).

Introduction

The development communication discourse perpetuates the interest of agency, thus, it is power-loaded. In the inter- and/or cross-cultural context of development communication, the power difference between the development agent of global idea and the local target population can result in a struggle between cultural influences. Apart from cultural imperialism, the uneven information flow –its direction, volume, and interpretation – and its effect on local cultures is one of the focal points of criticism (e.g. issues discussed at NWCIO). According to current research, the use of participatory (PC) and development support (DSC) communication can mediate the balance between power and culture. Embracing, rather than rejecting local culture,
religion, and ethics, together with the accentuation of traditional communication methods resulted in a significant change in the theories and practices of development communication (Melkote & Steeves, 2001). As part of this change, interlocalization becomes one of the necessary strategies of the empowerment paradigm in an international environment. This chapter shows that field agents rely on interlocalization – as shared experience – in order to enhance the success of PC and DSC communication.

George Soros, the financial guru, social commentator, and philanthropist, is the founder of the Open Society Institute (OSI), an international network of NGO dedicated to initiating and supporting civic society activities (Open Society Institute 2006). Soros’ philosophy and the roots of his praxis are based on the theory of the Open Society, a notion first developed by Karl Popper in the mid-20th century (Popper, 1945). My former research examined the forms and practices of development communication in OSI’s longitudinal project with Roma people in Central and Eastern Europe (OSI Initiatives, 2006). The study concluded that OSI predominantly uses PC practices and communication techniques in its development projects with Roma people in several European countries (e.g. Bulgaria, The Czech Republic, Hungary, Romania, and Russia).

This critical case study argues that OSI actively relies on interlocalization as strategic tool in its campaign for social change. After summarizing the three paradigms in development communication, I will introduce the core principles of the Open Society Institute. The critical case study provides an interpretation of how the use of the empowerment paradigm can rely on interlocalization as globalization tool in these international Roma projects. Interlocalization will constitute the base of globalization: it stems from local effort and grassroot communication, and emerges as the result of cooperation of cultures while solving shared socio-economic problems.
1. Paradigm Shift in Development Communication

Development as discourse is “a set of interpretations that are structured through institutional statements about people, places, and problems” (Wilkin, 2005, p. 199). At its essence, it means that communication forms and practices influence and enact development. As a research area, development communication often studies the forms and means of development discourse in an international context. During the recent two decades the concept of international development changed significantly and the approach to development communication went through a major paradigm shift. In the earlier understanding, development referred to social change, and communication was cited mainly in terms, as “the maintenance, modification and creation of culture” (Melkote & Steves, 2001, p.31). Nowadays, the goal is to achieve sustainable development that includes environmental and gender concerns with critical cultural addition.

Since the late 1990s qualitative research and post-structuralism enriched the scholarly works on development communication. Development communication endeavors to link the concept of Third World, development, and communication, together. At the beginning of the 21st century, the big questions asked by developing communities are: What do you do for us, to us, against us? Researchers base their theories on three major development models: modernization, critical/alternative, and liberation or empowerment theories (Melkote & Steves, 2001).

Sustainable development communication relies mostly on non-linear models of interpersonal, group and organizational communication, while includes local culture specifics (Mody, 2003). Development refers to a directed and active social change within a community. In order to achieve sustainability, it should facilitate participatory communication. Through
participatory communication, communities are encouraged to exercise their right to discuss and include their own preferences in development while defining its objectives, imperatives, and methods (Huesca, 2003).

**Modernization Model**

Modernization ideas are rooted in the colonization period. Originally, change in the Third World was to occur through exogenous factors with new ideas introduced from the outside – from the former colonizers. This mainstream development paradigm, prominent from the 1940s through the 1970s, is oriented around “progress measurement” via material and technological indicators. As Rostow claims, modernization is a “movement from traditional society through a point of ‘take-off’” into a situation of self-sustaining growth” (Schramm & Lerner, 1978, p. 45).

Only quantitative research is accepted in order to be scientific and objective. This positivist view of development heavily relies on statistical data. Thus, development is quantified and interpreted by indicators of socio-economic growth.

Economic growth is mostly measured by GDP, and socio-economic change is quantified by indicators such as industrialization and urbanization, literacy, communication systems, and political participation. Furthermore, this modernization view promotes a dirigiste approach in which social change should be directed by the government bureaucrats, technological experts or technocrats, and the business elite of corporations (Melkote & Steves, 2001). Therefore, the modernization paradigm mostly serves to legitimize the Westernization of the Third World.

In communication research, the mass media as the locus of investigation is predominant. The research focus is set on top-down communication and is based on secular mass media. Religion or local culture aspects are officially oppressed and do not form part of development. Moreover, few local ethical considerations are present in such development projects. As
development is initiated and mostly executed by international organizations (UN, WTO, IMF, World Bank) and national governments, the context is provided by macro settings as well. Thus, the research on development communication uses a nation as unit of analysis (Melkote & Steves, 2001).

This paradigm gave birth to several communication theories that focused on the individual reactions to mass media messages, including:

- Social marketing (Kotler, 1984)
- Entertainment education (Singhal & Rogers, 1988, 1999, 2001)

In contrast to Libertarian philosophy, human free will is a necessary precondition of moral responsibility, and based on war-inspired propaganda studies, Lasswell conceptualized mass media effect (Laswell, 1948) assuming that “human behavior is essentially irrational” (Melkote & Steves, 2001, p. 105). This idea was further employed by Berlo’s hypodermic needle (1960), and Schramm’s bullet theory (1964). Both Shannon-Weaver’s linear model of communication and Lazarsfeld’s two-step theories (1941) on the role of opinion leaders, perfectly fit with the lineal view of development and social change (Melkote & Steves, 2001). During this period Schramm (1964, 1978) and Lerner (1958, 1963) dedicated significant research to the connection between mass media and modernization that further proved the legitimization of Westernization in the Third World. Literacy and urbanization were in the locus of research (Melkote & Steves, 2001).
Concurrently, diffusion models focused on the effect of diffusion on innovation (Morris, 2005). Katz (1963) tied rural sociology with mass media, and Everett Rogers (Rogers, 1987) worked out the five steps adoption process model: by using adequate communication channels innovations will be adopted by members of social system over time.

The other two models fit into this modernization paradigm, although they have already shown the signs of change in this top-down lineal mentality. The social marketing theories, based on the research of parallel disciplines such as market research, product development, incentives, and facilitation, attempted to explain changing behavior patterns through the connection between knowledge and changing values (Kotler, 1984). Within this approach, Singhal and Rogers (1988, 1999, 2001) worked on the entertainment education models, using TV shows in order to convey educational messages.

**Critical / Alternative Model**

By the 1960s, even economists realized that the old modernization paradigm was not successful. Economic indicators clearly showed that this top-down, linear, Western model neither reduced Third World poverty nor promoted sustainable development (Black, 2002). Interdisciplinary scholars from various fields of sociology, political economy, and communication, introduced critical theories on development such as the decentralization models, tricontinentalistic Marxist theories, and subaltern theories.

Searching for a viable alternative, the economist Schumacher came up with the Middle Road solution, or “Small is beautiful,” embracing the idea of decentralization (Enelow, 2003). This approach, not unlike the “import substitution” schemes promoted by Nehru, suggested the incorporation of local production for local consumption in the Third World. Another stream tried to identify models for the basic need approach that included food, shelter, and health care
(Melkote, in-class communication, July, 2006). Nevertheless, the main critics of the modernization model of the 1970s were grounded in the vein of Marxist thought addressing power structures.

Critical Marxist theories (Bhabha, 2002; Fanon, 1963; Harvey, 2003; Said, 1993; Spivak, 1996) targeted the capitalist power relations and viewed development not only from an economic and social but also from a structural standpoint. Many of them opted for a tricontinentalistic approach, enabling a broader framework for development issues in general. Said (1978, 1993) worked out his orientalism with his contrapunctual reading on the representation and responsibilities of the intellectuals. Spivak (1996) melded deconstructionism with anti-eurocentric post-colonialism and pedagogy. Moreover, this critical paradigm was also shaped by Bhaba’s theory (2002) on mimicry and colonial ambivalence, not to mention the interception of violence and colonization from Fanon (1963), Harvey’s spatial view of imperialism and political economy (2003), Kwame Nkrumah’s writings (1965) on the destructive power of financial imperialism, or Gramsci’s papers (1971) on the subaltern. All harnessed Marxist ideology to advance the dialogue and push the envelope of comprehension regarding development (Appelbaum & William, 2005).

This critical paradigm, that included some of the post-modern research on gender, race, class and power issues, was already intended to embrace geographical and cultural considerations in their analysis. Nevertheless, it was the work of Paolo Freire (1983) that caused a direct shift in the understanding of development communication.

**Empowerment Model**

The deconstruction of the dominant paradigm was grounded in development as discourse (Sosale, 2002; Escobar, 2000), but also included economic, sociological and psychological
deconstruction. Culture and community with religion, gender (e.g. Wilkin, 2005), and environmental issues became the focal point of examination. In communication studies, more researchers viewed culture and communications as one, as modes of representation or meaning (Arnst, 1996; Belbase, 1994; Melkote & Steves, 2001). Place gained over space, local over global, and community, as unit became the focus of analysis. Power started to be viewed dialectically. Protest and social movement became part of the idea of network societies. With this breach of global spaces, ordinary people slowly gain voice and power for receiving and creating their own future. Thus, self-determination and dialogue slowly gained value in the process of development.

Based on Freire’s (1984) conscientization as the transformative power of education, the empowerment paradigm adopts a different view on development, namely, an approach to development that aims to make local places alive, visible, and interconnected both with each other and the world (Escobar, 2000). A holistic view of culture is gaining place with the understanding of naturally interactive cultures and self-change. Therefore, the role of new development communicators is to cautiously build trust while acquiring local knowledge and spurring the involvement of local people (Melkote, in class communication, July 2006).

The new definition of development pulled away from the materialistic view of human society and included the importance of religion and face considering culture as facilitator in the improvement of life. While the Marxist, as well as positivist, views treat individuals as audience, consumer, or unit of labor, the empowerment paradigm sets the focus of attention to the individual as a whole, as a person with self-awareness, and potential for self-actualization and advancement. Such a view required a methodological change. This change came from two
sources: from Freire’s theory on empowerment and from action research (Lewin, 1946; Kemmis, & McTaggart, 1990; Torbert, 1991; Bessette, & Rajasunderam, 1996; Bessette, 2004).

According to Freire (1984), dehumanization stems from power and humanity is stolen not only from the oppressed, but also from the oppressor. Therefore, “the great humanistic and historical task of the oppressed” is “to liberate themselves and their oppressors as well” (Freire, 1984, p. 29) as freedom is the “indispensable condition for the quest for human completion” (p. 31). In essence: “If men produce social reality … then transforming that reality is an historical task, a task for men” (p. 37). Thus, he relates ethics to social change. The question then remains: how can power be shared following this new kind of social change?

It was Kurt Lewin who first conceptualized the term “action research” in 1946. His research was focused on understanding of groups, group dynamics, and experiential learning. According to action research, social science should question how to develop well-informed actions and look for ways to conduct an action science (Torbert, Fisher, & Rooke, 2001). Action research gained interest of development communication scholars. Combined with Freire’s view on education, participatory action research (PAR) became a significant methodology as recognized form of experimental research for intervention, development, and change within communities and groups. PAR “focuses on the effects of the researcher's direct actions of practice within a participatory community with the goal of improving the performance quality of the community or an area of concern” (Bessette, 2004). Based on cyclical method of planning, taking action, observing and evaluating critically, it promotes two-way communication among groups and development practitioners (McNiff, 2002).

Participatory communication becomes a necessity for empowerment and change (Belbase, 1994; Arnst, 1996; Saik Yoon, 1996; Huesca, 2003; Cadiz, 2005). Shifting away from
modernization and critical models, the new development communication paradigm includes quantitative and qualitative studies on non-economic terms of equality, justice, discrimination, liberation, and oppression (Melkote & Steeves, 2001). Power and communication should aim and abet community building of people. Overall, as Bessette summarizes:

Participatory development communication is a powerful tool to facilitate this [socio-economic development] process, when it accompanies local development dynamics. It is about encouraging community participation with development initiatives through a strategic utilization of various communication strategies. (Bessette, 2004)

Since power is both created and exercised, institutions are needed to facilitate empowerment. Such facilitating institution is The Open Society Institute.

*Interlocalization connected to the empowerment paradigm*

As described in Chapter One, there is large research body on globalization and its effect on cultures. Nevertheless, globalization research is rarely connected directly to participatory actions research (Torbert, 1991; Bessette, & Rajasunderam, 1996) or the empowerment paradigm (Freire, 1984; Melkote & Steeves, 2001). Although glocalization (Robertson, 1995) somewhat takes into consideration local needs and cultures, it does not aim to eliminate power differences in the local-global interaction. Critical globalization theories in communication (Boyd-Barrett, 1977, 2003; McPhail, 1987, Escobar, 2000) call attention to the role of dominant nations and cultures, and the lack of voice and opportunities for those submitted or oppressed such as minority communities or developing nations. As presented in Chapter Two, I argue that interlocalization, the global interconnectedness and exchange of local knowledge and know-how, based on equal power relations and without the element of power hegemony. Moreover, I state that interlocalization is directly related to participatory development communication.

The process of cultural fluency “dynamically grows in a social context of
interdependence between self and others, enhancing our capacities to anticipate a range of possible scenarios about how our future relationships will evolve in unfamiliar cultural contexts” (LeBaron, & Pillay, 2007, p. 58). On the micro level, development occurs with the participation of organizations and individuals. Staff, as the agent of development communication, should be properly selected, prepared, and trained for getting involved with community members. They are the individuals who conduct and foster participatory or development support communication. On the macro level, development is not taking place in a vacuum. It requires the engagement of interconnected communities. I state that there is a need for a circular flow of information exchange in the empowerment paradigm. This reinforcing flow of information changes planes from the micro level to macro level and back; from local to more global and back to the local.

The circle starts with a global idea of development such as reduction of leprosy, AIDS, or discrimination, or promotion of peace, among others, that targets diverse geographic locations. Through working with local communities and using PC or DSC, development agents accumulate locally obtained knowledge and valuable field experience. Sharing successful techniques results in the creation of a global know-how that can be further used by other projects. Through such sharing, the global idea gets expanded, and merges elements of local needs into a new understanding. This globalized knowledge will be applied in local projects to enhance the success of sustainable development of local projects.

The dialectical dynamics of global idea and local experience creates a spiraling cycle of information flow and learning. A Hegelian principle of dialectics, eliminating with preserving, becomes an integral part of this circling process. The antagonistic unity of tradition and change of culture, the local influencing the global creates new sites of change. Most importantly, the relationship among the participating cultures should not be based on power differences. The
circular flow of the constant negotiation of a global idea with local interpretations, learning, and change will result in a new knowledge pool that is expandable internationally but not attributed to any particular culture group or national culture. This case study focuses on the connection between interlocalization and empowerment paradigm.

2. Case study methodology

A large amount of detailed information is posted on the Internet regarding the activities of the Open Society Institute that includes submission guidelines for grants and scholarships, news on the various initiative OSI is engaged with, and reports on the advances of their projects. This case study is focused on Open Society Institute (OSI)’s report and studies presented on-line on its Roma Initiative.

The analysis adopts an interpretive research method. It focuses on the discourse used by OSI in these on-line communications such as studies, news, and reports, regarding its Roma project. Some of these studies are prepared by other organizations that are not directly affiliated to OSI. Being a non-profit organization, the activities of OSI are publicly monitored. Moreover, the Open Society Institute relies on extended network systems involving both vertical and horizontal relations with other large and small organizations across nations. Thus, I find that the variety of sources that post the reports on the OSI web-site are fairly reliable.

In my selection of the research material, I opted for those longitudinal studies and periodical (annual or longer) reports that described the major difficulties, and updated results the Roma projects achieved in various countries. One of the reasons that I relied on these report from the OSI Web-site lies in language issues. The Roma projects are conducted in several European countries using different languages. In order to read local reports and opinions, or conduct on-site research, I could have encountered with serious language barriers.
These professional reports use both quantitative and qualitative information. They contain statistical data analysis and interviews, as well. Although I did not rely on self-conducted personal interviews, the reports offered detailed interviews with Roma participants, and with OSI agents. Thus, they provided “thick description” (Geertz, 1973) of the Roma people’s situation, and the difficulties the projects face with in each participating country. Moreover, I contacted OSI Budapest, the central office of the Roma projects and was able to gain access to the most recent report on the “Decade of Roma Inclusion.” From these secondary resources, I could extract details of the method OSI uses while developing their Roma projects.

My interest in Open Society Institute stems from two roots: my interest in minority issues, and in the work of George Soros. Race and power questions combined with my interest on the non-profit activities of Soros led me to choose the Roma project. Furthermore, my Hungarian origin and multicultural background (lived and worked in several countries) aided my current research. Although my initial research interest was directed to development communication practices, during the process I discovered ties to globalization as well. Thus, I needed to modify the research focus and include questions on globalization practices, in particular, on the use of interlocalization in cross-cultural development communication. Overall, the professional reports of OSI were highly valuable for my critical analysis on development communication discourse, and globalization aspects of the Roma projects.

3. The Open Society Institute (OSI)

With years of hard work, the well-known billionaire, George Soros created a network of non-profit organizations (including a university) that is currently present in 29 countries and active in more than 60 additional countries. For example, Open Society Initiative for Southern Africa (OSISA) and the Open Society Initiative for West Africa (OSIWA), are governed by
regional boards of directors and staffs and provide grants in 27 African countries. The OSIWA and OSISA foundations seek to “locate visions of open societies in their respective regions which serve to combat negative perceptions about Africa. The initiatives’ strength lies in their roots in communities and countries that stimulate and create African solutions to African challenges” (Open Society Institute, 2006). They offer a great variety of grants, fellowships, and scholarship for development purposes such as: grants for “enhancing coalitions of women’s rights and HIV/AIDS organizations in select African countries”, scholarship that aims the “equitable deployment of knowledge and communications resources for civic empowerment and effective democratic governance”, or a fellowship that “enables innovative professionals—including journalists, activists, academics, and practitioners—to work on projects that inspire meaningful public debate, shape public policy, and generate intellectual ferment within the Open Society Institute” (Open Society Institute, 2006). These foundations are independent, autonomous institutions in their pursuit of open society activities as the “priorities and specific activities of each Soros foundation are determined by a local board of directors and staff in consultation with George Soros and OSI boards and advisors.” (Open Society Institute, 2006).

Among its activities, OSI conducts scientific surveys across cultures and nation states. An example is the Justice Initiative Access to Information. In 2006, OSI published a study on the access to information laws and practices in fourteen countries on three continents (Open Society Justice Initiative, 2006). The survey relied on a self-developed monitoring tool that was “developed on the basis of a review of access to information monitoring, research, and standard setting by the Justice Initiative and other civil society organizations.” This study is particularly important for the principles of OSI. Open access to information is considered one of most important elements of open societies (Popper, 1945).
Organizations tend to reflect the core values of their founders. In order to assess the philosophy, goals, and practices of the Open Society Institute, it is necessary to summarize the philosophical underpinnings of its founder, Soros. These grounding ideas are promoted through the OSI and other non-profit organizations initiated by Soros. According to Soros, these organizations also provide reference points for his ideas of economic conditions and organization of open societies (Soros, 2003, 2006).

The Founder, George Soros

Soros (originally: Schwartz György) was born in 1930 in a Hungarian Jewish family. He graduated from the London School of Economics in 1952, and moved to the United States in 1954, with the intention of making enough money to become a self-supported writer-philosopher. In March 2008, his net worth was estimated by Forbes over $9.0 billion that made him 97th richest person in the world (“Forbes 400”, 03.05.2008). Since 1979, he has given away a total of $5 billion from his wealth through his charitable organizations and group (“Forbes 400”, 03.05.2008).

For his theoretical and practical contribution to human knowledge and social betterment he received honorary doctoral degrees from several universities in England, Hungary, and the U.S. As Paul Volcker, former Chairman of the US Federal Reserve Bank, wrote in the foreword of Soros' book, The Alchemy of Finance, in 2003:

George Soros has made his mark as an enormously successful speculator, wise enough to largely withdraw when still way ahead of the game. The bulk of his enormous winnings is now devoted to encouraging transitional and emerging nations to become ‘open societies,’ open not only in the sense of freedom of commerce but - more important - tolerant of new ideas and different modes of thinking and behavior. (p. XIV)

Soros’ life-long international work as philanthropist is fundamentally based on Karl Popper’s liberal democracy theory (1945) that defends the idea of a so-called Open Society.
Disenchanting from the Marxist view of economics, Popper (1945) expanded the notion of open society as the adversary of totalitarianism in defense of democratic liberalism. He (1945) promoted the criterion of “falsifiability” or compatibility to theory with possible empirical observation. Falsifiability serves to differentiate science from non-science, because “a theory is scientific only if it refutable by a convincing event” (Stanford Encyclopedia of Philosophy, 2008). Just as Popper, Soros—the critical-rationalist as he self-professed—not only defends globalization based on open societies, but equally stands for the scope of intellectual influence. Clearly a reformist activist, his theoretical approach to globalization rooted in his praxis (Soros, 1994, 2000).

Apart from Popper, the theoretical thrust of Soros also relies on a modified version of Pierre Bourdieu’s theory of practice (Bourdieu, 1977). Endorsing Bourdieu’s, reflexivity (Bourdieu & Wacquant, 1992) – that social science researchers should be aware of their own interference with the research subject as the research objectivity of social sciences is always influenced by subjectivity of the researcher – Soros (1994) considers that events “are facts and observations are true or false, depending on whether or not they correspond to the facts” (First section, para. 3). Thus, knowledge is incomplete, and this imperfect understanding of reality modifies reality itself, (Soros, 1994). Rooted in years of experience in financial markets, Soros applies reflexivity in his philosophy and theories on economy.

Classical economy is based on rational choices of self-interest while maintaining that both values and opportunities are independently given. Soros considers that self-interest cannot lead to a stable system as values, opportunities, and, consequently, choices are reflexive (Soros, 2006, p. 227). He states that there is “…a reflexive interconnection between values and opportunities, between subjective and objective aspects of reality, as a result of which neither the
prevailing values nor the available opportunities can be fully known and the equilibrium point cannot be determined” (Soros, 2006, p. 12). As a result, perfect competition that produces static equilibrium is an unrealistic model and cannot support equitable socio-economic growth (Soros, 2006, p. 227). Thus, he advocates for an open society that “constitutes near-equilibrium conditions precariously posed in between static disequilibrium of a closed society and the dynamic disequilibrium of chaos and disorientation (Soros, 2006, p. 66). Dynamic disequilibrium is based self-interest and the constant flow of reflexive situations. As Soros explains, reflexive situations are “characterizes by a lack of correspondence between the participants’ view and the actual state of affairs… The expectations cannot qualify as knowledge” (p.6). In such manner, the tension between knowledge and reality can only be solved by morally responsible reflexive actions.

In the absence of knowledge, participants must introduce an element of judgment or bias into their decision-making. As a result, outcomes are liable to diverge from expectation…reality can become far removed from what it would be if the participants based their decisions on knowledge alone. (Soros, 2006, p. 7)

Overall, near-equilibrium in open societies “enables participants better cope with reality than they could if their views were far from reality” (Soros, 2006, p. 7).

While understanding and accepting imperfect understanding or fallibility, Soros promotes liberal democracy (2006). He explains that an “open society derives the need for liberal democracy from the recognition of our imperfect understanding or fallibility” (2006, p. 67). He believes that in an interconnected and interdependent world, societies should be open to the outside while allowing free flow of goods, ideas, and people, and open inside with free flow of thoughts and social mobility (Soros, 2006). He suggests that social relations and associations should be based on written and unwritten contracts that can be revisited and changed through
negotiations of the parties (Soros, 2003). Overall, he recommends critical thinking through self-
observation, reflection, and self-learning as responses to altered circumstances (Soros, 2006).

In Soros’ global strategy (2006), economic freedom is mingled with some level of
governmental intervention through centralized economic planning of environmentalism and
social justice. To be more efficient, it may also include some degree of state ownership of
resources. According to Soros (2003, 2006), well-established international laws could regulate
private and government practices, while ensuring global justice and civic society activities of
cultures and nations.

The Soros foundations clearly represent Soros ideas on the open society while
encouraging socially reflective and responsible actions. In 1991, after the change to free market
systems in Eastern Europe, Soros explained the updated goals of his international foundations:

_ Mindegyik nemzetközi alapítvány saját maga szabja meg jellegét, attól függően, hogy az
  ott dolgozo emberek milyenek, és attól függően is, hogy mire van szüksége az illető
  országnak, ahol működik; _

[Each foundations should define its goals and project by two components: by the people
working in it and by the needs of the host country] (p. 142).

In other words, the foundations should cooperate with local people and determine their projects
together with them. Development should depend on national (later on local) needs. This
statement is an early indicator of the ways OSI projects developed towards empowerment and
the use of participatory communication. Delegating decision and trusting in the people of his
foundations, he does not wish to tie his donations to personal requirements:

_ Az alapítványnak a valóságos világban kellet valóságos jó cselekedeteket végrehajtania. Ha
  hagyom személyes érzelmeimet is közrejatszai, akkor az alapítvány tevékenysége
  hatékonyságát veszi, és önző csalássá változott volna. _

[The foundations had to accomplish real good deeds in the real world. If I allowed my
personal feelings to interfere with the projects, than the foundations would have lost
efficiency, and would have become selfish frauds] (Soros, 1991, p. 151)
Through the past seventeen years, the Soros foundations have grown considerably and gained international attention. His primary foundation, the Open Society Institution (OSI), has disbursed over $400 million annually in recent years (Open Society Institute, 2006).

**International Roma Projects, Initiated by OSI**

The OSI’s mission statement clearly states its interest in grass-root initiatives. It also exhibits advocacy for some level of glocalization (Roberson, 1992) while connecting local and global interests in the context of a socio-cultural interdependency.

The Open Society Institute seeks to shape public policies that assure greater fairness in political, legal, and economic systems and safeguard fundamental rights. On a local level, OSI implements a range of initiatives to advance justice, education, public health, and independent media. At the same time, OSI builds alliances across borders and continents on issues such as corruption and freedom of information. OSI places a high priority on protecting and improving the lives of marginalized people and communities. (Open Society Institute, 2006)

Just as fifteen years earlier, the emphasis is on the local, the grass-root level initiation of ideas and projects. Soros and the OSI board remained in a consultative capacity.

OSI is active mainly in five sectors of social life such as freedom and democracy, human rights, education, public health and access to care, or transparency and access to information. Working with marginalized communities is among the main goals of OSI. As such, the Roma Initiative was a social change projects that targeted the situation of the Roma people (also called Romani or, commonly, “Gipsy”), one of the most controversial diasporic minorities in Europe. The Roma Initiative and its successor, the Decade of Roma Inclusion, is a cross-cultural longitudinal project that OSI has worked for over 16 years. By targeting discriminatory practices and developing local Roma communities, it aims to aid the inclusion of the Roma diasporic communities in 8 countries (Open Society Institute, 2006).
The Roma people originated from the Punjab and Radjastan region of Northern India. Their language, the Romani, still maintains elements of Urdu that was commonly spoken in the region during the Persian Empire (Fraser, 1992). They migrated away in retreat from the advance of Islam during the 11th century. The Roma migrated across the Indian Ocean to the then Ottoman Empire and then on across the Mediterranean to the European Continent (Rishi, 1976). They arrived in Central and Eastern Europe during the 14-15th century on the coattails of incursions by the Ottoman Empire (Romani.org, 2008).

Although they are referred to as “Gypsies” in English or “Gitanos” in Spanish, they prefer to be called as Roma or Romani (Romani.org, 2008). There are some speculations about their European name: They might have passed through the then Ottoman province of Egypt so the name can refer to “the nomads coming from Egypt” (Romani.org, 2008). The Roma culture holds high values to traditions and has difficulties adopting changes in social structure (Fraser, 1992). Their cultural cohesiveness has faced overwhelming pressures through centuries by continuous persecution from empires and neighbors alike. Although they lost almost 500,000 people, fortunately, they survived the ethnic cleansing of the Holocaust during the Third Reich (Crowe, & Kolsti, 1991). In 2007, the number of Roma people in Europe was estimated at ten million people, of which around 80 percent live in Central-Eastern Europe (Open Society Institute, 2007).

The Roma people comprise Europe’s largest trans-border ethnic minority (Rorke & Wilkins, 2006). Their diasporic communities face strong discrimination –including racial and gender – practices that targets their way of life, belief system, social organization, and culture (Rorke & Wilkins, 2006; ERRC, 2008; Romani.org, 2008). Unfortunately, the Roma people lost...
the social safety net offered by the socialist system. The fall of socialism in Central Europe in 1989 resulted in a worsening situation for the Roma people.

The Roma population’s comparably limited prospects have barely improved over centuries of persistent stigma and discrimination on the part of the rest of the population, including governments at all levels in many parts of the country. Their overall economic situation arguably has gotten worse since the collapse of the Soviet era totalitarian regime, which tended at the very least to guarantee more jobs and a minimum level of support to all residents. (Hoover, 2007. p. 36)

Another example is given by Will Guy, an OSI collaborator in Czechoslovakia, who observed that “the first tangible experience of this brave new world was not a sudden expansion of civic liberties but of harsh realities as any [Roma] were flung out of their predominantly manual jobs in the now virtually redundant heavy industries” (Rorke & Wilkens, 2006, p. 8). It is mostly due to the aid of non-profit organizations such as OSI that the Roma situation gains public exposure and has the hope for social improvement and inclusion. Such effort is indicated in the recent report (2007) of the Initiative for Health Foundation (IHF), a Bulgarian non-profit partner of OSI. They explained about their outreach program among Roma drug users:

Although it began seeking out and serving Roma clients two years earlier, IHF did not initiate a Roma-specific project until 2001, when the Open Society Institute (OSI) first provided support for such an initiative. In addition to supporting the project’s direct and ongoing operations, OSI’s funds were also used by the NGO to host seminars on service delivery among ethnic minorities. IHF organized four such trainings over two years (2001 and 2002). Participants included local civil society groups from across Eastern Europe, all of whom were already working with or considering expanding services among hard-to-reach populations such as Roma. (Hoover, 2007. p. 34)

During the Initiative, OSI employees cooperated directly with Roma individuals and community leaders in order “to help them mobilize their communities, to help themselves” (Rorke, & Wilkens, 2006, p. 4). Moreover, OSI employs people from Roma background in their projects in order to enhance culture proximity with targeted Roma communities (OSI Initiatives, 2006). Employment affiliation with OSI projects also enhances the acceptance and credibility of Roma among people from the majority population (Rorke, & Wilkens, 2006).
The development unit of the Roma initiative projects is connected to Europe’s largest ethnic diaspora located in several countries. The countries involved are the so-called transitional societies. After the fall of the socialism in 1989, Central and Eastern Europe has been going through transition, consolidation and expansion of democracy. Given the multi-country complexity, poisoned history and political sensitivity of the Roma situation, as well as their ingrained cultural stance as outsider-nomads, it is not surprising that only an NGO like OSI would be well placed to tackle the issue.

The Roma Initiative was OSI’s umbrella program for all its Roma-related efforts. The Initiative tried to assess and aid the change in the Roma people’s situation in these transitional societies. It aimed to improve “the social, political, and economic situation of Romani populations while helping to build an indigenous Romani leadership” (Open Society News, 2006, p. 4). According to OSI News, more than $34 million has been spent in 12 years on different Roma community projects within the program. The Roma Initiative filled an organizational vacuum while seeking to redress discrimination. It offered innovative solutions based on the latest Development Communication techniques. Such communication techniques are further developed in its successor project, the Decade of Roma Inclusion.

After several years of grassroots efforts, the OSI’s Roma projects resulted in a new Pan-European program, the Decade of Roma Inclusion (DRI) to run from 2005–2015. The DRI is an action framework, supported (although not administered) by OSI and the World Bank. Designed to monitor the improvement of the socio-economic status of the Roma people across the region, the program is endorsed by the Prime Ministers of eight countries (Bulgaria, Croatia, the Czech Republic, Hungary, Macedonia, Romania, Serbia-Montenegro, and Slovakia), and supported by the European Commission, the Council of Europe, the Council of Europe Development Bank,
and the United Nations Development Program (Decade of Roma Inclusion, 2006). The participating states “made a political commitment to close the gap in welfare and living conditions between the Roma and the non-Roma and to break the cycle of poverty and exclusion” (OSI Initiatives, 2006).

4. Participatory Communication in the Roma Projects

According to Wilkins (2005), the “categories constructed through development discourse not only shape problems and those perceived to suffer from those problems, but also legitimize appropriate solutions” (p. 199). Studying the reports allows me to interpret how OSI assess Roma people and their needs, and how these needs should be addressed. The information obtained from the reports is also a good source for defining OSI’s view on development and determining which development model is prominent in their practices.

To begin with, the Roma Initiative counted on three major types of activities (Open Society News, 2006 p. 4):

- Part of the strategy of investing directly in Roma, OSI offered support for Romani rights NGOs (e. g. European Roma Rights Centre, Roma Participation Program) to combat discrimination and build alliances, particularly around the international Romani-led movement to desegregate schools.

- OSI’s fellowships and its programs for women, children and youth, in the fields of public health, media, justice, and education.

- Pursuing fast and flexible grant making with a focus on the younger generation of activists and students; Ensuring direct participation of Roma in project implementation, design, and evaluation; Forging long-term partnerships based on coherent and sustainable strategies.
These activities accentuate participatory communication (PC), which is linked to the empowerment paradigm. Moreover, even development support communication (DSC) elements can be found in their educational approach and the Roma women’s programs: OSI supports Roma leadership in the abolition of local discriminatory practices in schooling and offers aid for the empowerment process of Roma women. “The categories constructed through development discourse not only shape problems and those perceived to suffer from those problems, but also legitimize appropriate solutions” (Wilkin, 2005, p. 199).

Participation is a basic element in the Empowerment model: “People who are the objects of policy need to be involved in the definition, design, and execution of the development process” (Melkote & Steves, 2001, p. 333). My findings show that OSI often uses the empowerment paradigm in its work with Roma people. Nevertheless, sometimes elements of the modernization (e.g. top-down communication) and the critical/alternative models are also present in their approach –mostly when they must deal with the interconnected communities, both locally and internationally. The analysis in this chapter will demonstrate the use of these models in OSI’s development discourse.

Years of Rappaport’s research defines empowerment as a “mechanism by which individuals, organizations, and communities gain control and mastery over social and economic conditions … over democratic participation in their community…and over their stories” (Melkote & Steves, 2001, p. 355). The accentuation of this empowerment is used throughout the reports: “OSI’s fellowships and its programs for women, children and youth, public health, media, justice, and education have also developed a wide range of initiatives to give Romani communities immediate assistance as well as empower them to secure their rights and end their marginalization” (Wilkens, & Rostas, 2005, p.4), or “The Roma Cultural Participation Project
supports the cultural inclusiveness and empowerment of Roma” (Rorke & Wilkens, 2006, p. 12). Other reference shows that any funding “should be …guided by one simple criterion: whether in its intended or unintended consequences the initiative empowers Roma” (Rorke & Wilkens, 2006, p. 6). These are good indicators that throughout the Roma development project OSI intended to use the empowerment model.

Another important element of the empowerment model is participatory communication. According to Waters, participatory communication “stipulates that reflection and action should be guided by dialogue, that is communication that is democratic, collaborative, and open, geared toward the mutual engagement of social actors as equal subjects” (2002, p.91). Examining OSI on-line reports (Rorke & Wilkens, 2006; OSI Initiatives, 2005, 2006, 2007.) on the Romani cases, the discourse clearly indicates elements of participatory communication. In the funding strategy approach OSI included the need for “direct participation of Roma in program design, implementation, and evaluation” that clearly represents bottom-up communication during the project (Rorke & Wilkens, 2006, p. 2). The same report points out the necessity of active involvement of Roma people in the projects: “substantive Romani involvement and partnership” (p. 5).

OSI documentation also shows that OSI stresses importance on constant dialogue with Roma communities. According to Melkote and Steves (2001) “development communication should be practiced not as message communication but rather as emancipatory dialogue, a particular form of non-exploitative, egalitarian dialogue” (p. 299). OSI reports claim that the success of the Roma development initiative “requires transcending conventional donor-recipient relationships and fostering dynamic partnerships with Romani civic organizations based upon trust, transparency, and reciprocity” (Rorke & Wilkens, 2006, p. 5). Work with marginalized
communities and achieve fluid information exchange is always a delicate process. Understanding the culture and the marginalization of the Roma is particularly delicate in extreme problems such as drug abuse. The following quote from a former Roma heroin user from Bulgaria who got involved with the Initiative for Health Foundation (IHF), a filial organization of OSI:

After I stopped using I decided I wanted to know more about how to help others like me. For a while I worked as a counselor at Phoenix House [the only licensed therapeutic community - i.e., intensive rehabilitation program for drug- and alcohol-dependent individuals – in Bulgaria]. Then about three and a half years ago I came to IHF to be an outreach worker. (Hoover, 2007. p. 22)

This former drug user is from the community and he is part of the Roma culture. Recruiting persons like him certainly facilitates the dialogue with the targeted population. Moreover, sharing his experiences with other development workers can aid to better understand and improve the situation of Roma drug abusers. Involving such volunteers in the project also fulfills Soros’ principles that his foundations should recognize and address local communities needs.

Participatory communication and community empowerment involves not only members of the targeted community but also development agents. According to participatory communication research, communication

“is essential, but by itself, it is insufficient if the material, human and financial resources needed to carry out the development initiative itself, do not accompany it. Likewise, those resources are insufficient if there is no communication to facilitate community participation and appropriation of their own development.” (Bessette, 2004).

OSI makes special effort to properly prepare its staff and enhance their ability for conducting dialogue with Roma people: “Organizations working with Roma need to invest in staff training to ensure that their staff members are tolerant and unbiased” (Rorke & Wilkens, 2006, p. 3). Educating OSI employees is in accordance with participatory research. The role of OSI employees involved with the Roma Initiative is collaborative as facilitators and activists. Creative solutions are necessary in order to ensure dialogue. Such new initiative was the
appointment of so-called “Roma health mediators” whose task is to improve the Roma community’s access to comprehensive health care in Bulgaria.

Launched in 2004, the initiative focuses on training Roma individuals to serve as links or “bridges” between their own communities and local healthcare systems, which are almost unanimously staffed by non-Roma. The goal is to identify and overcome the numerous impediments - primarily cultural, but also economic and educational - that limit the inclination or ability of community members to seek out and obtain health care, particularly preventive care.

Mediators are trained to achieve these goals by focusing on both sides of the equation. On the one hand, they seek to raise awareness within Roma communities as to how, when, where, and why to place greater priority on health care. At the same time, they focus on improving providers’ understanding of, sensitivity to, and response to cultural differences between themselves and Roma. (Hoover, 2007. p. 75)

This example underlines OSI’s the effort put to achieve dialogue and social change. Learning more about Roma culture can help to reduce – and ultimately eliminate – discriminatory views of people from the majority culture. Freire’s notions of empowerment only can be achieve with such culture mediation.

The cross-border cooperation and experience-sharing of the participating development agents results in distinct forms of globalization practice such as interlocalization. Development should offer a chance for betterment (Black, 2002). When the Roma Initiative aimed for the empowerment of Roma people, it intended to achieve social justice for the Roma, and to help them build capacity and equity. Moreover, participatory communication should be an educational process for the participants and for the researchers (Melkote & Steves, 2001, p. 338).

Based on Melkote’s comparative table on the theory of modernization and the empowerment paradigm (Melkote & Steeves, 2001, p. 352), I created the following table (Table 2.) that summarizes the different Roma projects indicating the type of development communication model used in these initiatives.
Table 5. OSI Roma Initiative Projects and Development Communication Models

<table>
<thead>
<tr>
<th>Social Sphere</th>
<th>Project</th>
<th>Goal</th>
<th>Focus</th>
<th>Development Model *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freedom &amp; Democracy</td>
<td>Roma Participation Program (RPP)</td>
<td>Civil &amp; Political Participation Promote Equality</td>
<td>Ethnic Communication Roma Internal Policies Anti-discriminatory Info. &amp; Actions</td>
<td>mostly EMP</td>
</tr>
<tr>
<td>Human Rights</td>
<td>RPP &amp; ERRC</td>
<td>Right to Equal Protection under the law</td>
<td>Exposure to Int'l Affairs</td>
<td>EMP &amp; somewhat MOD</td>
</tr>
<tr>
<td></td>
<td>Network Women* Program</td>
<td>Empowering Women</td>
<td>Addressing ingrained prejudices, Leadership development and Women* rights training</td>
<td>Mostly EMP and CRIT</td>
</tr>
<tr>
<td>Education</td>
<td>REI, RCI &amp; RMUSP</td>
<td>Educational/Legal Reform Foster Cultural Diversity</td>
<td>Scholarships &amp; education initiatives Culture initiatives</td>
<td>EMP</td>
</tr>
<tr>
<td>Public Health &amp; Access to Care</td>
<td>Public Health Program</td>
<td>Empowerment in the Health Care System</td>
<td>Information Data Collection Increasing Professional Opportunities</td>
<td>EMP &amp; MOD</td>
</tr>
<tr>
<td>Transparency &amp; Information Access</td>
<td>Network Media Program (NMP)</td>
<td>Media Access &amp; Romani Media Dev.</td>
<td>TV &amp; Radio News Agencies, development of Roma reporters</td>
<td>EMP</td>
</tr>
<tr>
<td></td>
<td>Roma Translations</td>
<td>Language Preservation</td>
<td>Language Promotion &amp; Grants for Reporters Books on Roma Culture by Roma Authors</td>
<td>EMP</td>
</tr>
</tbody>
</table>

* Empowerment Model (EMP), Critical paradigm (CRIT), Modernization Model (MOD)

Advocacy for community issues formed part of the Roma Initiative. The Roma Participation Program (RPP) aimed the civic and political participation of Roma people while promoting equality of Romani ethnicities. To achieve this goal, OSI helped Roma people to form local community activists offering “direct investment in Roma and Romani-led NGOs through strategic coherence combined with fast and flexible grant-making” (Wilkens & Rostas, 2005, p. 4). RPP not only offered institutional support for these grass-roots Romani NGO-s, but also got involved with training programs. OSI strongly supported self-development initiatives.

Critical scholars such as Escobar, Mody, or Wilkin noted that “participation, without concomitant changes in structural conditions, may not be efficient to foster substantive social change” (Wilkin, 2005, p. 205). Therefore, OSI’s effort to work with conjunct communities and
with larger – national and international – social structures is essential for the success of
sustainable development in their Roma projects. The newly founded Romani NGOs aimed to
achieve changes in the practices of ethnic communication reinforcing anti-discriminatory actions
(OSI Initiatives, 2006). On the other hand, RPP also supports broad-based campaigns that target
systematic national and international policy reforms.

OSI advocates that the anti-discriminatory laws of the European Union must be applied
equally; thus “improve information about the laws and strengthen equality commissions and
ombudsman’s offices” is highly important (Rorke & Wilkens, 2006, p. 17). In their approach,
some elements of the modernization paradigm such as top-down communication and
Westernization are also present as they must pass on the information and educate EU laws and
practices. Nevertheless, being a cross-national ethnic group, exposure of Romani leaders, “both
male and female,” to international affairs is crucial to Roma communities (OSI Initiative, 2006).
The *Equal Rights for Roma Communities (ERRC)* aimed to achieve right to equal protection
under the law for Roma people (Open Society Institute, 2006).

According to Wilkin, “in practice, gender appears to operate in a way that essentializes
women according to their biological conditions rather than account for their social, political, and
economic relationships” (2005, p. 201). Being aware of gender inequality in Roma cultures, OSI
addresses women’s issues from the root of gender discrimination while they rely on the
empowerment and somewhat on the critical development paradigms.

Gender discrimination is a complex question when working in patriarchal minority
groups. There is a contradiction between identity and gender equality particularly in Romani
culture with its accentuated patriarchal system. In her paper on gender discrimination, Bogdanić,
an activist of “Better life,” Croatian Romani women NGO, reported to the Roma Decade:
…if one protects the rights of minority groups, then one also protects a minority culture that is patriarchal. The main point of this feminist argument is that multicultural liberalism argues for protection of the rights of minority groups, but ignores the unequal relations of power within minority groups and the gender discrimination that exists within them. (Bogdanić, 2005, p. 2)

Thus, in order to advocate for gender equality of Roma women, development activists cannot rely on participatory communication exclusively. Information dissemination, thus top-down communication on women’s right, teachings about motherhood based on equal roles in families etc., becomes a necessary communication practice. Unfortunately, such teaching can rightly be perceived as attempt to change culture traditions. As Bogdanić also asserts: “There is a clear conceptual contradiction between the choice of framing the issue in these terms and any goal of Romani women’s empowerment” (Bogdanić, 2005, p. 2).

As indicated in Table 5, gender and power relations have elements of critical and the empowerment development paradigm. The three major social inequalities such as race, class, and gender, are tied to power relations (Fensternmaker, & West, 2002). The phenomenologist Merleau-Ponty points out that any gender “is a historical situation rather than a natural fact” (Butler, 1990. p. 271), and Michel Foucault insists that sexuality is produced in historical context (Foucault, 1980). According to Butler (1990), gender identity constituted in time through stylized repetition of acts, and instituted through the stylization of body.

I assert that gender is socially constructed and reiterated (Butler, 1990), and the concept of gender includes social hierarchy and the organization of equalities and inequalities. Thus, development that targets gender discrimination interferes with culture traditions and should partially rely on top-down communication. My rationale for not expanding further such gender issue lies in the complexity of the gender and power dimension, and its relations to social
tradition and culture. This research does not target the relation between feminism and interlocalization or the role of feminism in hegemonic globalization.

Despite of the difficulties, it is important to work on the empowerment of women and become effective advocates for their issues. With the aid of Network Women's Program's initiative OSI organized “leadership development and women’s rights training to develop, link, and catalyze a core group of committed Romani women leaders” (Rorke, & Wilkens, 2006, p.10). Working with engrained prejudices is always a delicate process. As OSI denotes, it is important to “figure out how all of us can develop a discourse about gender and equality within the Romani community without creating irreparable divisions and disruptions” (Bitu, 2005, p.11). Giving voice to Roma women, sharing their stories in diverse forums such as conferences, in report, on the Internet, can be considered one of the ways participatory communication can efficiently help to abolish gender discrimination and aid social change. This short story represents one such effort:

Mária Vamosiné Pálmai, who dropped out of school at age 14 to get married, painted a bleak portrait of the current status of most young Romani women. “Romani girls are deprived of the right to decide about their own lives. They are often made to leave school as they start to mature in order to secure their virginity for marriage. They don’t follow their dreams. They don’t care about their health. There are no options for them.”

Pálmai, however, has taken bold steps to help others like her. At 23, Pálmai, the mother of three, founded ARANJ, one of the first Romani women’s organizations established by Romani women living in traditional communities. ARANJ has conducted research and organized public discussions about sexual taboos and the cult of virginity in Romani communities. The research/public education project, based on a model developed by Enisa Eminova and 12 other young Romani women in Macedonia, resulted in the report On Virginity. Pálmai said that young Romani women in Bulgaria, the Czech Republic, Romania, Serbia, and Slovakia will soon be initiating similar projects supported by OSI’s Network Women’s Program. (Network Women’s Program, 2003)

This example also indicates the ways interlocalization might aid the success of such cross-cultural participatory communication projects. Through sharing and learning from each other’s
experiences, interlocalization becomes a necessary tool for connecting community members and
development agents across borders successfully.

There are several programs that aim for educational reform for the Roma ethnic minority,
such as Roma Culture Initiative (RCI), Roma Education Initiative (REI), and Roma Memorial
University Scholarship Program (RMUSP). Educational programs are directly linked to the
promotion of tolerance of culture diversity and non-discriminatory practices. This field has a
double aim: it not only tries to foster Romani children’s education but in order to reduce
discriminatory practices and enhance cultural acceptance, it also targets the schools that educate
these children. However, equal access to quality education for children cannot work within the
Roma community alone. “Governments need to produce action plans for school desegregation
with fixed time frames and to implement these plans at the local level with meaningful incentives
and sanctions”—it should include child-centered teaching methods and family involvement
(Open Society News, 2006, p. 4). The empowerment model is clearly present in these programs.

Westernization or ethnic tradition loss by induced change results from the immersion of
ethnic children in the existing education systems. The modernization model often applied in any
such project as ethnic minorities cannot determine the general school curriculum. In order to
reduce top-down development focus, the REI program “also collaborates with parents, local
communities, service providers, and other institutions, including local and national governments,
in an effort to approach education comprehensively” (Rorke & Wilkens, 2006, p.11).

Through Roma Culture Initiative (RCI,) community outreach is an important part of
Romani minority culture and social acceptance. RCI is “focused on the promotion of greater
cultural awareness among younger Roma and on supporting scholarly research covering new
grounds” (Rorke & Wilkens, 2006, p. 12). The initiative fosters diversity and includes ethical
issues in the solution of discrimination. OSI places special emphasis on the importance of a collaborative effort: “Success will require multinational strategies and cooperation. “It will require sharing lessons learned and best practices,” (Rorke & Wilkens, 2006, p. 3). Therefore, the empowerment development discourse is clearly present in the culture preservation effort.

Grants were also made to strengthen adequate access to health care. OSI’s health care approach is two-fold: increase opportunities for Roma to become nurses, doctors, and social workers; and collect health data and information about Romani populations in order to identify areas for improvement. To accomplish their objectives, OSI uses both the empowerment and the modernization (data collection, top-down communication) paradigm: “The Public Health Program has funded many local NGOs to provide Romani communities with information on health and health insurance, to document discriminatory practices in the health sector, and to present findings to national human rights advocates” (OSI Initiatives, 2006). One of the examples for the participatory communication is the fellowship offered for an investigative journalism on the topic of access to health care for Roma (OSI Initiatives, 2006).

The Roma ethnic preservation effort is further strengthened by the OSI’s Network Media Program (NMP) initiative. This initiative fosters the learning and use of the Roma language in the Mass Media. According to OSI, “current assistance covers close to 25 television and radio outlets and news agencies in 11 countries” (Rorke & Wilkens, 2006, p. 13). There is also a special program that promotes Romani written language. According to Rorke & Wilkens’s report, the “Roma Translation Project supported the translation and publication of 28 titles on Romani history, culture, and society in the national languages of 10 different countries across Central and Eastern Europe” (p. 14). These programs offer efficient aid to Roma empowerment
as adequate communication strategies emphasize Roma contributions to society, and promote the benefits of tolerance and diversity in a democracy.

Furthermore, the successor program, The Decade of Roma Inclusion provides a joint initiative for the information and media programs. The Roma Information Project (RIP)’s goal is to “assist Romani groups to use information and communications technologies strategically in their work, enabling them to advocate more efficiently for their rights and better serve their communities” (Rorke & Wilkens, 2006, p. 14). Through training and culture promotion of the Roma, these projects will further aid the anti-discriminatory efforts of OSI. As Rorke & Wilkens (2006) wrote: “the outside world must learn more about Romani culture and people, and we must challenge the verdict that Roma are born guilty” (p. 17). Empowering Roma people by using participatory communication will lead to sustainable development of the Roma people.

This research demonstrated that the Roma Initiative mostly relied on participatory communication and the empowerment development model. Unfortunately, the community development efforts were not as successful as expected. Changing embedded discrimination practices through mediation of culture requires longer period of time and slow change through several generations. It is reported in the Open Society News: “Since the mid-1990’s, … mobilization for political activity has come not from the grassroots but from what I’d call the middle class—the few Roma who were educated under the former communist regime, who had some schooling, who finished high school and entered universities” (Bitu, 2005, 11). According to OSI, current programs such as the Decade of Roma Inclusion, should concentrate on the creation of a larger platform of community activists.
5. Interlocalization in development communication of the Roma project

The dominating empowerment paradigm and the shared learning process during the project creates a new approach toward globalization. OSI is interested in the empowerment of Roma people on the basis of social justice. Using diversity as a standard, OSI believes that underdevelopment stems from the lack of power and control of Roma people over economic, political, and cultural resources. The context of the majority of Roma programs is community based. Thus, the cooperation goes beyond nation states – just as Martin, McCann, & Purcell (2003) research showed: “Formerly the national scale was the dominant scale at which political and economic power was coordinated. Increasingly, there is a greater role for supra-national scales and sub-national scales ...” (Stocchiero, 2004, p. 14). Moreover, OSI development agents act as facilitators, collaborators, and participants in the individual and community development of Roma people. Overall, OSI uses a non-linear participatory communication model while conveying information and helping Roma empowerment.

Local development agents must adjust their actions on the base of a growing pool of know-how obtained through the interaction and learning from the local Roma communities and working with their representatives. In order to communicate more successfully, the OSI agents must use this locally obtained know-how to the benefit of other Roma communities while aiding the empowerment process of the Roma ethnic communities across borders. Therefore, this accumulated local and country-specific experiences and knowledge of the OSI agents is shared through constant dialogue and periodic reports.

Interlocalization as Tool for Successful PC and DSC

The three development communication paradigms apply different communication practices in the interrelation of local-global. In the modernization paradigm, large multinational
organizations and corporations view local communities as global consumers discarding the local culture specifics. In this top-down communication there is no place for local considerations. Just as the OSI report states: “Many projects seem designed for institutional convenience and are often strikingly at odds with, or disconnected from, the clear and pressing needs of the community in question (Rorke & Wilkens, 2006, p. 6).

As the critical paradigm gains place, glocalization efforts become more relevant. Products and services used in such development projects are glocalized, and aided by regionally adjusted promotion. An example of such effort is The Glocal Forum. It aims to “help people from countries around the world strike the balance between sharing the benefits of globalization and maintaining local autonomy” (The Glocal Forum, 2007). It counts on the support of the World Bank, and many United Nations agencies, as well as private and public sector companies when fostering city-to-city cooperation in building peace internationally. It declares that

Glocalization empowers local communities, linking them to global resources and facilitating initiatives of peace and development, while providing opportunities for the local communities to direct positive social change in the areas that most directly affect them. Peace and development are conditions of social change. Resources are therefore diverted to the local level to increase the impact and cost-effectiveness of development projects for sustainable peace. (The Glocalization Manifesto, 2004, p. 3)

It is clear though that even if some recollection of local needs become part of these projects, they are still directed by the dominants development organizations and agents. Only the empowerment paradigm allows the full consideration of local cultures and needs.

In the empowerment model, local expertise forms part of decisions concerning development. Participatory communication includes horizontal and also bottom-up vertical communication. It is the decentralized connection among field agents and ONG-s, and their horizontal communication practices that gives space and provide context for interlocalization.
OSI mostly coordinates these efforts, and provides framework for information exchange. Among others, the Romanian Roma Center for Social Intervention and Studies (CRISS) that directly cooperates with the Roma projects of OSI, serves as an example of such approach.

Romani CRISS contributes permanently to the elaboration of such reports, particularly concerning the respect for Roma’s rights in Romania. The information processed by the organization are sent, by means of press releases and reports, to various partners, national or international, which in their turn use some information or specific cases for the realization of certain reports. Moreover, Romani CRISS participates in public meetings, national or international, where it presents reports, information, statements that are at their turn used or become part of the meeting’s official documentation. (Romani CRISS, 2007, p. 49)

It is clearly stated that information sharing is an essential part of this development project. Through equal participation of cultures or interlocalization, such projects aim to resolve local community needs and non-rival externalities that include affiliations with local authorities. The experience-based know-how is shared and re-applied across cultures. Another example is the DecadeWatch, “an initiative of a group of Roma activists and researchers to assess progress under the Decade of Roma Inclusion 2005–2015 since its launch in February 2005” (DecadeWatch, 2007, p. 13). It is the Open Society Institute and the World Bank that support this initiative. Such support includes “training and mentoring the research teams, as well as developing the methodology for, providing editorial support to and printing this series of reports” (DecadeWatch, 2007, p. 13).

The recent report of DecadeWatch (2007) clearly indicates that the reports are prepared by “Roma activists from Roma civic alliances—Roma NGO networks—in most of the countries” (p. 14). There is no indication that in this information sharing one culture takes the leadership or dominance over other national culture or the Roma minorities. Most importantly, they claim the benefit of sharing field experience as the “members of the DecadeWatch team also reflected their own experience, often spanning many years, in reviewing policies for Roma in their
countries…DecadeWatch is the result of a team effort and a process of intensive and frequent interaction.” (DecadeWatch, 2007, p. 14).

The field experience of local development agent and the voices of local community members create new knowledge that is available globally. According to this OSI report, the “Decade process aims at giving Roma a voice in the countries’ efforts at promoting inclusion, and Roma report that they are being heard more than before the launch of the Decade“ (DecadeWatch, 2007, p. 18). It has further global exposure, as the reports – similarly to any OSI project or initiative– are also available to any field agents or person interested through the Internet. Through OSI Web-sites and report, people can learn about individual stories – both by Roma people and field agents – that exemplify Roma discrimination and social difficulties. This form of sharing also aids the Roma projects of OSI. Thus, the circle of information share began and local experiences are available and shared globally.

According to OSI, this teamwork is just the first step as “The DecadeWatch team will work—together with governments and partner agencies and institutions of the Decade—to further develop this methodology and make a contribution to establishing mechanisms to measure the Decade’s success” (DecadeWatch, 2007, p. 16). The learned experience and successful technique are shared across borders among the participants of these Roma project. DecadeWatch aims to “compare countries’ performance across a host of indicators—to track progress and to identify the areas where each country can benefit from the experience of another” (DecadeWatch, 2007, p. 15). Such principles prove that the Roma projects of OSI create global knowledge as a result of the summoning local expertise. Through “International Steering Committee meetings and other Decade workshops and activities, they have built contacts across countries that have promoted the exchange of good practices” (DecadeWatch,
Moreover, OSI finds it crucial “that all countries move away from a fragmented project approach to developing systematic policies” (DecadeWatch, 2007, p. 20). This cooperation and experience shared for further utilization and improvement of the Roma initiatives.

The coordination offices of the Decade of Roma Inclusion “have built up important experience over the last two years” (DecadeWatch, 2007, p. 18). The identification and maps of good experiences and the cross-country comparisons (DecadeWatch, 2007, p. 18) will be reactivated on the local level. Together with local and national authorities, the success of regional or national policies “largely relates to the degree Roma themselves are involved in advising on their design and implementation, in particular where programs cater to the population at large and do not have specific Roma targeting.” (DecadeWatch, 2007, p. 20). Thus, the circle of local-global-local is created, and interlocalization is used as tool for globalization.

Furthermore, globalization and development goes hand-in-hand in the Roma projects. OSI finds it important “that all countries move away from a fragmented project approach to developing systematic policies” (DecadeWatch, 2007, p. 20). To reinforce such effort from media perspective, the Roma Decade of Inclusion “aims to increase cooperation between Romani media and mainstream media outlets and to assist in the creation of national and cross-border Romani media policy” (Rorke, & Wilkens, 2006, p. 13). Such priorities also reinforce OSI’s effort for culture inclusiveness instead of the promotion of the view of a dominant culture.

Conclusion

The cross-cultural projects of the Roma Initiative and the successor Decade of Roma Inclusion, aim to abolish discriminatory practices against Roma minorities in Central-East Europe. Principles and actions of these Roma projects indicate that grassroot cooperation and
efforts have a significant role in the Roma projects. As this case study demonstrated, these projects largely rely on participatory development communication practices. Based on the principles of the Open Society Institute, development agents need to get involved with grass-root effort originated from local Roma communities. The agents are engaged with Roma people through constant dialogue. Moreover, development workers – both volunteers and agents – often originate from the Roma minority. Thus, they can increase cultural sensitivity and understanding of the Roma within non-Romani NGOs, and also strengthen the relation between Romani people and members of the majority cultures.

To abolish discrimination is a long-term task. To change race and gender discrimination practices and to provide equal treatment to the Roma minorities is a very slow process. In addition, there is a need for effort across various cultures as the Roma people form a large diasporic community present in several countries. They also embrace the idea of culture equality. Such principle was applied in 2005 when OSI decided to “include Romani culture in its Arts and Culture Network Program recognizing Romani culture on equal terms with majority culture” (Rorke, & Wilkens, 2006, p. 12).

The information flow among development workers of OSI and connected NGOs of these Roma projects is transparent and frequent. Moreover, related news, reports, and studies are available through the Internet. This chapter provided examples of the ways experience sharing by OSI development agents can create global awareness and knowledge for the sustainable development of the Roma. Interlocalization as a special form of globalization is present in the interrelatedness of these participating NGO-s and development workers.

Gramsci (1971) referred to people who take their local knowledge from life experiences, and use that knowledge to address social changes and problems as "Organic intellectuals." OSI-
related development workers seem to approximate these “organic intellectuals”. They exchange their practices and experiences across cultures in order to achieve social change in the life of Roma people. This chapter provided evidence that interlocalization based on participatory communication can serve as viable tool for sustainable development.
CHAPTER V

FINAL CONCLUSIONS

This study is positioned at the center of the globalization debate. As globalization greatly affects every nation around the world, scholars from various fields such as sociology, economics, business administration, or communication studies, often debate its concept and practices. Centered on communication studies, this research crossed over to other disciplines such as management and economics while trying to explore alternatives in globalization practices.

Resulting from power differences, globalization causes advantage and disadvantage for the participants. This study viewed the dialectics of the globalization process critically while intending to effectively meld views from the field of communication studies with political economy, and cultural studies. With reference to mass communication imperialism (Tomlinson, 1991; Boyd-Barrett, 1977) and the empowerment paradigm of development (Freire, 1984; Melkote & Steeves 2001; Bessete, 2004), my focus on the local-global debate was not so much on the aspect of dominance as on the alternatives to it.

The multidimensional process of such hegemonic globalization yields the possibility of new concepts such as glocalization (Robertson, 1992). Although, the interpretation of the concept varies by scholars (Bauman, 1998; Friedman, 1999; Gabardi, 2001; Chan, 2004; Khondker, 2004), glocalization refers to the effort of global organizations to include local considerations in their internationalization process. Somewhat similar to glocalization, my concept of interlocalization, a new globalization phenomenon, directs attentions to the relevance of cross-cultural connections of minorities. As I asserted in this dissertation, through non-discriminatory mediation and dialogue of the participating cultures, interlocalization is a possible
form of advancement in equity and justice among communities and nations. Deetz (1990) argues that the “social distribution of power and influence, particularly in regard to expression opportunities and the effect on the social construction of meaning and personal identity, should be the central communication policy question” (p. 45). Considering the affect of globalizing power on cultures, interlocalization reveals an alternative global interconnectedness based on culture equality and non-discriminatory practices.

While almost all studies of globalization or glocalization contain a vertical view on the global-local debate, interlocalization refers to the horizontal dimensions of globalization that includes the interconnectedness of local-to-local. Conceptualizing the cross-cultural context is interlocalization. I have advanced the perspective that interlocalization offers a more equitable culture relationship for participants in the process of internationalization. Thus, cultures can become a dynamic social force through interlocalization. The general conditions of interlocalization as analyzed in Chapter Two are the following:

1. Cross-cultural context of internationalization; might contain intercultural (majority-minority) experience
2. Horizontal aspect of globalization – local-to-local relations
3. Non-discriminative and non-hegemonic relation of cross-cultural contacts that result in dialogue and mediation of participant cultures
4. Horizontal (peer-to-peer) communication that also includes participatory development communication within the framework of the empowerment paradigm
5. Decentralized organizational structure
6. Culture-specific product or idea
7. Specialized product on niche markets (Focus strategy)
8. The context-specific dimensions of interlocalization as process, tool, or method

Based on my notion of praxis, this critical analysis also provided examples that are helpful for better understanding interlocalization practices. The two critical case studies, presented in Chapters Three and Four, interpreted the ways interlocalization gains space in the internationalization process of a Catalan media conglomerate, Grupo Planeta, and in the social development of a cross-border diasporic minority community, the Roma people.

My analysis of interlocalization is deliberately concise. Nevertheless, there are possible parallels for the approach of Grupo Planeta among other profit companies that rely on interlocalization method in their growth process. I foresee that the internationalization strategy of the Catalan commercial media companies such as Grupo Godo or Grupo Zeta is somewhat similar. Further studies are needed on these companies.

Previous critical globalization studies did not make much connection to the alternative forms of minority commercial media, or to cross-cultural participatory actions research. This research considered that commercial media could opt for culture equity in its international growth. Grupo Planeta is an example that through the affect on company structure and culture, multiple identity layers of a minority culture and the experiences in majority-minority struggle can facilitate culturally unbiased mergers and acquisitions. On the other hand, I asserted that the empowerment development model can gain efficiency with interlocalization. The case study on the Roma projects of the Open Society Institute demonstrated that cross-cultural sharing of participatory communication experiences can results in the creation of global knowledge that does not contain cultural domination of any nation or community.

My research used interpretive-critical research methods in both critical case studies. In the study of the minority-owned media conglomerate, Grupo Planeta, I relied on secondary data
(company documents, articles, statistics, and research papers) and also on primary data such as interviews with executives from the Group, and with unrelated professionals (both practitioners and scholars) from the field of communications. The research targeted the perceived and culture-related intentions of a media conglomerate in its international mergers, rather than audience responses to local media acquisitions. The reason behind my decision lies in the expansion process of the Group.

The publishing brands of Grupo Planeta have over three decades of international experience in mergers and acquisitions. Nevertheless, the media convergence of the company with audio-visual companies such as radio stations, television, or content producers, has started relatively recently, in the late 1990s. In fact, the first important international acquisition of a media company, the Columbian “El Tiempo” occurred just last year, in 2007. To assess audience responses to the merger and its effect on local cultures would require more length of time. Nevertheless, it would be important to conduct a second research later on that could detect the forms and quality of changes in local cultures.

The second case study considered only secondary data analysis. Due to its Web-site design, there is an excellent opportunity to access OSI reports and studies on-line. These documents examine not only statistical data but depict field stories of Romani people and development agents of OSI and related NGOs. Thus, working with these documents, I could assess more data on OSI’s development communication practices than trying to conduct interviews myself in eight European countries. It is reasonable to consider these documents reliable, as the reports and studies are officially sponsored and published.

In this study, I made a first attempt to describe, conceptualize, and demonstrate the ways interlocalization works in different disciplines. Being the first attempt, the study has limitations.
My theoretical approach did not focus on the ways different value creation forms react to interlocalization, nor does it make the connection between technology and interlocalization. Another constraint of the research stems from the Catalan case study. There is a need for empirical study on the audience response to Grupo Planeta’s diversification strategy – does the audience experience the benefits of the intended interlocalization?

I consider that interlocalization, as a new globalization form, is a growing phenomenon. The future decides if this phenomenon remains marginal in the globalization process, or it can gain further space and relevance as a more just internationalization. Searching for the limits of the interlocalization phenomenon, some could ask questions such as: Is the method of interlocalization limited to minority-owned media internationalization? Can the interlocalization method be extended to large media corporations? How do cultural hybridity, digital virtuality, and deterritorialization interact with interlocalization? How does interlocalization relate to glocalization and other forms of globalization? Can international press agencies use interlocalization as tool in their effort for equity-based news reporting? Does interlocalization strengthen or weaken nation-states? Future studies should try to find answers to these questions.

As of now, I can foresee that with the strengthening resistance of the developing nation’s media against Westernization, and the expanding use of participatory communication in development projects, the interlocalization phenomenon can become an acceptable alternative. I tend to think, that if interlocalization becomes more widely used, it might contribute to the formation of new socio-political structures that are not based on countries but cultures. As such, it might aid the reorganization of human social groups through cross-border cultural unification. This local-to-global discussion can lead to a major change in the content of unity in diversity.
Because as Lewin underscored:

“The research needed for social practice can best be characterized as research for social management or social engineering. It is a type of action-research, a comparative research on the conditions and effects of various forms of social action, and research leading to social action. Research that produces nothing but books will not suffice” (Lewin 1948, pp. 202-3)
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re=1439


May 7, 2008

TO: Eva Szalvai
COMS

FROM: Richard Rowlands
HSRB Administrator

RE: Continuing HSRB Review for Project H07D293GE7

TITLE: EMERGING FORMS OF GLOBALIZATION DIALECTICS: “Interlocalization,” a new praxis of power and culture in commercial media and development communication

This is to inform you that your research study indicated above has received continuing Human Subjects Review Board (HSRB) review and approval. This approval is effective May 18, 2008 for a period of 12 months and will expire on May 17, 2009. You may continue with the project.

Please communicate any proposed changes in your project procedures or activities involving human subjects, including consent form changes or increases in the number of participants, to the HSRB via this office. Please notify me, at 372-7716 or hsrb@bgusu.edu, upon completion of your project.

Good luck with your work. Let me know if this office or the HSRB can be of assistance as your project proceeds.

Comments:

C: Dr. Alberto Gonzalez
May 29, 2007

TO: Eva Szalvai
COMS

FROM: Richard Rowlands
HSRB Administrator

RE: HSRB Project No.: H07D293GE7

TITLE: Convergence and Dialectics of Globalization in the Catalan Mediascape: Critical analysis of media firms Grupo Planeta and Grupo Gado

You have met the conditions for approval for your project involving human subjects. As of May 29, 2007, your project has been granted final approval by the Human Subjects Review Board (HSRB). This approval expires on May 17, 2008. You may proceed with subject recruitment and data collection.

The final approved version of the consent document(s) is attached. Consistent with federal OHRP guidance to IRBs, the consent document(s) bearing the HSRB approval/expiration date stamp is the only valid version and you must use copies of the date-stamped document(s) in obtaining consent from research subjects.

You are responsible to conduct the study as approved by the HSRB and to use only approved forms. If you seek to make any changes in your project activities or procedures (including increases in the number of participants), please send a request for modifications immediately to the HSRB via this office. Please notify me, in writing (fax: 372-6916 or email: hsrb@bgnet.bgsu.edu) upon completion of your project.

Good luck with your work. Let me know if this office or the HSRB can be of assistance as your project proceeds.

Comments/Modifications:

c: Dr. Alberto Gonzalez

Research Category: Expedited #7
Personal Interview Consent Form

This interview is for the purpose of completing the dissertation research project of EVA SZALVAI. The project is about CONVERGENCE AND DIALECTICS OF GLOBALIZATION IN THE CATALAN MEDIASCASE: Critical analysis of media firms Grupo Planeta and Grupo Godó. I am trying to find new forms and ways of media globalization that are culturally less biased or unbiased (non-hegemonic). I hope, that my empirical investigation gets us closer to a more just form of media globalization. Interviewing you, and obtaining your insights and opinions will help me to understand the project topic better.

You indicate your consent when you participate in this project and allow me to record your opinion and comments for the purpose of this project. This personal interview will take some 40-50 minutes of your time. The interview notes/tapes will be safeguarded and the recorded tapes will be discarded at the end of the study. All questions will be asked within the research context. Therefore this study is of minimal risk as it will not cause any harm in your professional or personal life.

You have also been informed that you will be quoted in my project report with attribution to your company and position. It is also clear though, that you can choose not to answer specific questions that I asked you, or ask not to be quoted personally in the project report regarding specific issues. Furthermore, you have the right to withdraw any time during this interview. Your decision to participate in this project is totally voluntary.

If you have any questions about the interview or requirements of this project, please contact me, EVA SZALVAI at 1-419 318 4178 (USA), or E-mail: evas@bgnet.bgsu.edu, or my dissertation advisor, Dr. Alberto Gonzalez, Vice-Provost of Academics, BGSU, at 1-419-372 6076 (USA), or E-mail: agonzal@bgnet.bgsu.edu. If you have other concerns, you can contact the chair of the Human Subject Review Board of Bowling Green State University at 419-3727716 or hsrboffice@bgsu.edu about your rights as a research participant.

Thank you very much for your help on this project.
Sincerely,

Eva Szalvai
Ph. D. Student, BGSU, Communication Studies

(Interviewee) I agree to be interviewed and read the consent form above.

_____________ (Name in print)
_____________ (Signature)
_____________ (date)
Documento de consentimiento para una entrevista personal

El objetivo de esta entrevista es la recerca e investigación para completar el proyecto de tesis doctoral de EVA SZALVAI. El proyecto es sobre la CONVERGENCIA Y DIALECTICA DE LA GLOBALIZACION DE LOS MEDIOS DE COMUNICACIONES EN CATALUÑA: Un análisis de las compañías Grupo Planeta y Grupo Godó. Estoy intentando descubrir nuevas maneras de globalización en las medias de comunicaciones, formas que son menos evasivas culturalmente (sin hegemonía cultural). Espero que mi investigación empírica nos conduzca hacia una globalización más justa. Sus opiniones y conocimientos proporcionados durante la entrevista me ayudarán a comprender mejor el tema de mi proyecto.

Con el hecho de que esta de acuerdo en participar en la entrevista y me permite a anotar/grabar su opinión, me da su consentimiento de formar parte de este proyecto de investigación. Esta entrevista personal durará unos 40-50 minutos. Las notas y la cinta de grabación de la entrevista estarán protegidos en un sitio seguro y serán destruidos al terminar este estudio. Todas las preguntas serán formuladas dentro del contexto de este investigación. Así, la entrevista representa un riesgo mínimo y no le afectará negativamente en su vida profesional o personal.

Además, le he informado que sus palabras pueden ser referidas en el proyecto junto con su posición y el nombre de su empresa. Sin embargo, Usted puede optar de no responder a preguntas específicas o pedir de no ser referido/a personalmente en cuestiones específicas relevantes al proyecto. Su participación en el presente proyecto es completamente voluntaria y puede retirar de la entrevista o anularla en cualquier momento.

Si tiene preguntas adicionales sobre los requisitos de las entrevistas del proyecto, por favor, no dude de contactarme (Eva Szalvai), por teléfono 1-419 318 4178 (en los Estados Unidos) o por correo electrónico: evas@bgsu.edu, o a mi consejero académico, Dr. Alberto González, Vice-Provost of Academics, BGSU, 1-419-372 6076 (USA), o por correo electrónico: agonzal@bgsu.edu. Si le preocupan otros aspectos de la entrevista, puede contactar directamente el director de la Junta de Revisión de Recerca Sobre Sujeto Humano en la Universidad Estatal de Bowling Green, teléfono: 419-3727716 o correo electrónico: hsrb@bgsu.edu.

Muchas gracias por participar en mi proyecto.
Saludos cordiales

Eva Szalvai
Estudiante doctoral
BGSU, Facultad de Comunicaciones

School of Communication Studies
Department of Journalism
302 West Hall
Bowling Green, Ohio 43403
419-372-8349
fax419-372-0202
www.bgsu.edu/departments/commst
He leído e entendido el formulario de consentimiento y estoy de acuerdo para estar entrevistado.

(Nombre del Entrevistado)  (Firma)  (fecha)