



Is peak globalisation upon us?

Globalisation is much more than trade in goods

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Key points

We examine the phenomenon of globalisation as it affects New Zealand. We look at its impact on New Zealand and ask whether it is a force which has had its day (peak globalisation) or is it continuing to morph and evolve.

A return of the dark era?

Globalisation is in rude health. In world terms cross-border links and exchanges are strong and getting stronger. This is far from being a new dark age. While the world's physical trade is now growing more slowly than at any time since year 2009, other globalisation components like people movement (long and short term) and information/data movements are compensating by continuing to grow.^{1 2}

Intriguingly, there has been a rise in the search for the “New Zealand version” of globalisation. In part, this is a result of the move to a more open economy with a wider range of sources for its migrants and an amazing diversity of possible international sources of news, entertainment and just diversion.

Globalisation – has it been the best of times or the worst of times?

Discussion of globalisation in New Zealand has become thoroughly mixed up with the debates about the economic policy changes of the last fifteen years of the Twentieth century. This period was one of those disruptive passages in New Zealand's economic (and political) history. There were decisive shifts in policy settings and many people are still seeking reasons.

Debates on Trans Pacific Partnership – Keystone Cops territory?

The Trans Pacific Partnership debates had one side speaking past the other, loudly; while the second was largely refusing to speak at all. And when that side did speak, it was with a rather smug “gotcha”. Heat was added to the debate by the negotiating text (over which countries were haggling behind closed doors – as is normal practice) being leaked steadily onto the internet.

Our scan of the evidence went back to basics

This hardening and separation of attitudes in the public discussion have tended to obscure the basics of globalisation: what is it, what are its dimensions, what is known about how it has evolved over time; and how has it played out in New Zealand?

Taking this set of questions as a brief, we set out to capture a more rounded picture of the changes in New Zealand brought by globalisation over the past fifty years or so, from existing evidence. Our approach was to look backwards before looking forward; testing the thought that there is nothing really new under the sun. This method was based on secondary sources since there was no room in the resourcing of the project

¹ For instance, it was recently announced that Argentina which has defaulted on foreign loans many times including as recently as in 2001, was selling 100-year bonds successfully in international markets.

² For the importance of data see <http://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/digital-globalization-the-new-era-of-global-flows> and <https://www.economist.com/news/briefing/21721634-how-it-shaping-up-data-giving-rise-new-economy>

for original data collection. This meant frequently using qualitative information as there was often a shortage of long term meaningful data series.³

So, what did we learn – peak globalisation?

The decline in the growth of world trade and cross-border finance globally since the 2008 financial event has provoked widespread concern that globalisation may be stagnating, or even reversing. The consequences of “de-globalisation” for New Zealand, as a small trading nation, would be significant.

But taking a wider view allows us to see that globalisation is by no means a finished project, since flows of cultural texts, ideas, and information – already strong in New Zealand throughout the 20th century – continue to accelerate and grow in volume.

Changes in cultural flows

The shifts in world trade and finance flows have been accompanied by changes in the direction and composition of global cultural flows:

- For much of the 20th century, New Zealand, as a small, English speaking country was highly receptive to imported culture from the United States, Britain, and Australia
- The source and direction of cultural flows do not necessarily correspond to economic flows. While for much of the 20th century (prior to the 1960s) New Zealand’s trade policy was turned decisively away from Australia, trans-Tasman cultural transactions – like film and radio – were significant.
- Though the discourse on sovereignty has long set the terms of debate over globalisation in New Zealand, it is important to recognise the extent to which the dominant political ideas of the last century have often arrived in New Zealand by way of these global cultural flows.

Globalisation makes us more aware of our local identity

While globalisation has often been described as a straightforwardly homogenising force, New Zealand examples remind us of the *localising* effects globalising processes can generate, especially among small state actors.

So globalisation generates an automatic flip side that focuses on *who we are* and *what is different about us as New Zealanders*, as we become more involved with the rest of the world.

Put in a historical context

Current trends in globalisation are easier to understand if placed in a broader historical framework. These include:




- New Zealand’s size plus geographic isolation and settler-colonial history inform our current position within, and response to, intensified global flows
- Though globalisation has often been rendered in public debate as unprecedented, inevitable, and a fundamental threat to New Zealand’s sovereignty, a broader historical perspective reveals the various ways in

³ We have summarised the findings from an initial scan of the literature. This is by no means exhaustive and is intended to open a discussion rather than be the last word on the impact of globalisation on New Zealand.

which New Zealand, once imagined as an agricultural outpost in an imperial world-system, has long been naturally involved in global information flows (both directions) and accompanying modes of governance

- Nevertheless, falling transaction and communication costs have meant that some forms of global integration – including trade, foreign direct investment (FDI), and short-term migration – have reached unprecedented levels in recent decades.

Timeline: Globalisation and New Zealand

	1960	1970	1980	1990	2000	2010	
Trade	NZ was “back to back” with Australia, looking jointly to Britain as the key export market.	NAFTA signed in 1965, reflecting shift towards regional, trans-Tasman trade circuits (see 2.1).	Britain’s accession to the EEC finalised in 1973, reshaping NZ’s economic geography (see 2.1).	Trans-Tasman free trade largely realised after Closer Economic Realisations with Australia came into force in 1983. The Uruguay Round had a major positive influence.	Growth of ‘new services’ trade, especially tourism. Auckland hosted APEC summit the previous year, in 1999.	GFC set off sharp deceleration in growth of global trade relative to GDP. NZ’s service exports continue to grow.	
Merchandise trade (% of GDP, 10-year average)	32.18	40.19	43.69	43.33	44.57	42.3	
Capital Flows	Prior to the reforms of the 1980s, NZ was “one of the most closed developed economies in the world” (see 2.2).	Until 1970, the bulk of overseas investment in NZ was greenfield, to bypass protectionist restrictions on imports.	Growth of cross-border capital hastened through adoption of liberal international investment regime in 1980s.	Policy shift towards encouraging Foreign Direct Investment (FDI). FDI advisory group established by government in 1991.	Dependence on foreign capital increased considerably in the 1990s. In 2000, NZ ranked first in UNCTAD’s Transnationality Index.	Overseas Investment Act 2005 placed restrictions on “sensitive” assets. Global collapse in cross-border lending.	
FDI, net inflows (% of GDP, 10-year average)	...	1.49	2.96	3.74	0.97	0.80	
Mobility and Migration	Tighter criteria for assisted immigration from Britain in the late-1950s.	Inception of twice-weekly jet services between London and NZ in 1963. Auckland International Airport opened in 1966.	Trans-Tasman Travel Arrangement introduced in 1973. Net outflow to Australia rose significantly in the subsequent decade.	Immigration Amendment Act 1991 introduced points-based system for setting and controlling migration targets.	Adjustments to points system in 1995, with stricter English needs. Overseas-born population continued to rise. In 1999, Tourism NZ’s new unified global ads (see 2.3).	The number of overseas-born continued to increase, reaching 22.9% in 2006, compared with 19.5% in 2001 (see 2.3).	
Visitor arrivals	39,134	177,580	465,163	976,010	1,789,078	2,525,044	
Cultural Flows	High consumption of British, American, and Australian popular culture (see 1.4). Television established in 1960. Britain remained NZ’s leading source of books.	Political ideas circulated globally and filtered through NZ society, including global counter-culture opposition to the Vietnam War.	Global communications continued to improve. Dominant political ideas of the coming decade had largely global, American origins.	Globalised cultural flows increasingly reflected in local art and literature (see 1.4).	Tensions between globalising and localising forces evident in consolidation of national tourism branding.	While trade and cross-border lending have stalled, cross-border bandwidth continues to grow.	

Data sources: World Development Indicators, Statistics New Zealand

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1. Globalisation overview: more than economics

1.1. Have we seen peak globalisation? Or is it just trade?

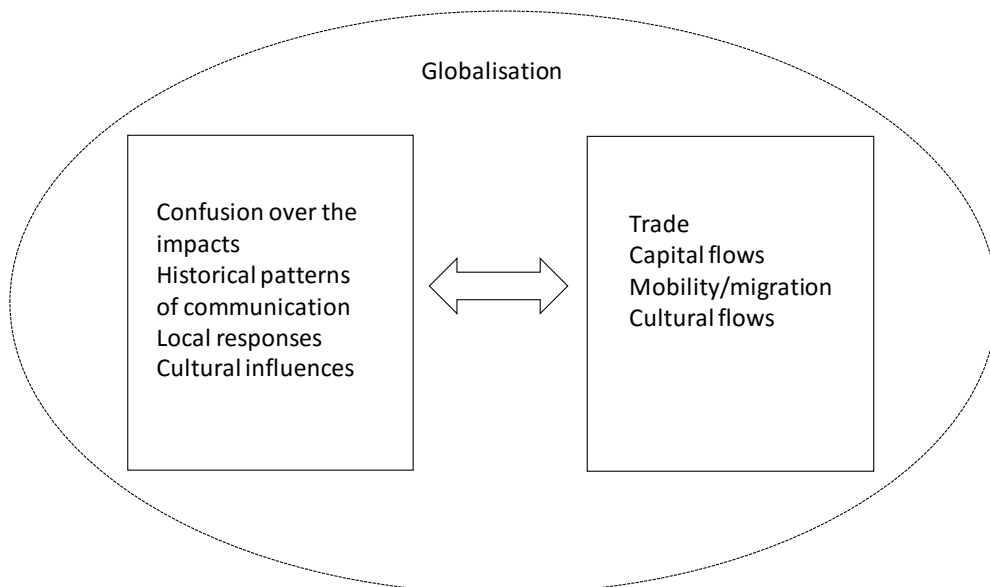
Some commentaries have claimed the end of globalisation, on the basis of a slowing in world trade.⁴ Our quest was to conduct a preliminary test, using a broader focus, whether slowing in world trade suggests that we are seeing “peak globalisation” when seen in the round.

As a scoping exercise, this review is necessarily limited in resourcing, and thus in the enquiries that can be made. It uses largely secondary sources and looks mainly at qualitative measures, as they are what is at hand.

Disentangling the various strands of globalisation requires setting out the issues, approaches, and characteristics to further understand impacts and how they subtly and unsubtly shape behaviour.

The diagram below sets out our approach to investigating globalisation impacts. In the first part of this paper we examine the overlapping social and economic issues, global flows, cultural underpinnings and impacts and reactions to increased interconnectedness. In the second part of the paper we set the physical, capital, human and cultural flows.

Figure 1 Approach to examining globalisation impacts



Source: NZIER

⁴ See for example the recent debate at Davos: <https://www.weforum.org/agenda/2017/01/the-end-of-globalization-davos-disagrees/>

We have chosen this approach to draw out the main points without the complications of a detailed examination of all the issues. In this way, we hope to gain insight into the wider workings of globalisation as they impact on New Zealanders. The potential cost, of course, is that the process of abstraction has eliminated characteristics that are vital to the full understanding of globalisation.

1.2. Completing the circle – a finished project?

By now it is well known that, as Paul Krugman (2016) recently put it, globalisation is currently “under political siege.” The populist reaction to world trade, and the apparent demise of the Trans-Pacific Partnership, together with the deceleration of world trade and the collapse in cross-border lending, has provoked widespread alarm about the future of globalisation among both popular commentators and professional economists.⁵ But since trade is already remarkably free by historical standards, Krugman suggests, the “best attitude might well be to treat globalisation as a more or less finished project, and turn down the volume on the whole subject.” So, an economic slow-down yes; but hardly a dark age.

What would it mean for New Zealand to think about globalisation in these wider terms? Certainly, we are far from the “explosion of globalisation talk” witnessed in the 1990s (Lang, 2006, p. 903), but globalisation nevertheless remains an important – even polarising – discourse in New Zealand politics. And for good reason: in a small, geographically isolated, export-dependent nation, it may not be possible – much less desirable – to stop talking seriously about the past and future implications of economic and cultural integration.

Though globalisation has often been figured in New Zealand political debate as an inevitable process with enormous staying power,⁶ the uneven profile of the evolution of 20th century world trade (Krugman, 1995) and the more recent retrenchment in cross-border trade and capital flows underline the important point that economic globalisation is, in practice, neither linear nor unstoppable. However, *cultural* globalisation in New Zealand – and the movement of ideas, cultural texts, and information that the term implies – appears far from a finished project. New Zealand, as we shall see, has long been involved in global cultural circuits, and these flows are only accelerating.

For this reason, the project of describing and analysing these flows remains equally unfinished. Accounting for the on-going relevance of globalisation in a New Zealand context requires us to recognise the dense interconnections – as well as dissonances and tensions – between its overlapping economic and cultural aspects. While disciplinary structures and problems of analytic scale have often prevented cultural and economic analysis from operating in tandem,⁷ we hold that any economic analysis

⁵ Mallaby (2016) takes issue with the normative account that the retrenchment in cross-border capital flows and trade in the years following the onset of the GFC in 2007 necessarily portend a new era of “de-globalisation,” and argues for a reappraisal of these developments in less alarmist terms.

⁶ In 2001, Helen Clark remarked, “[I]ove it or loathe it, globalisation is here to stay, and we have to succeed within that framework.” See Skilling (2011) for this view of globalisation as “an inexorable and immutable external force.”

⁷ There are, of course, notable exceptions, including the variegated critical traditions associated with historical materialism.

of globalising forces is incomplete without attention to its cultural counterpart, and vice versa.

As Lang (2006, p. 902) notes, to date “most debate over globalisation has remained dependent on some economic register,” and while this paper is no exception, we are equally interested in looking at the ways in which the increased mobility of goods, capital, and people has been complemented by changes in the *cultural* economy of New Zealand.

1.3. Framing globalisation – taking it wider

Globalisation has long been an “essentially contested concept” (Patman & Hall, 2007, p. 113). In popular and professional usage, the term is used to describe an extraordinarily wide variety of phenomena, ranging from “*improvements in communication, to free trade and economic interdependence, to cultural homogenisation, and the expansion of corporate capitalism and foreign direct investment*” (Baragwanath, McAloon, & Perkins, 2003, p. 19). As has often been noted, this definitional uncertainty and ambiguity – and the various inflections given the term throughout the diverse and vast theoretical body of work devoted to it – means that much of the debate on globalisation takes place at an abstract level at a remove from specific empirical contexts (Baragwanath et al., 2003, p. 16).

For our purposes, globalisation denotes intensified global economic and cultural integration as a result of falling transaction costs in communications and transport (sometimes called the “cost of distance”).⁸

Following Mallaby (2016), we have chosen to break down the effects of globalisation on New Zealand’s economy and society into several broad categories of analysis: trade, capital flows, mobility and migration, and cultural flows.⁹ Given the resources available, our interest is in combining a broad quantitative economic account of these factors, with qualitative evidence of cultural circulation and transmission.

We recognise that the nation-state, for obvious reasons, remains a problematic category of analysis for studying globalisation, since the very term is often used to describe the dissolution of national boundaries and, in more critical accounts, the erosion of state sovereignty. But we argue that discussing globalisation from a specifically New Zealand location and perspective is both valuable and necessary.¹⁰

Globalisation has impacted New Zealand in locally and historically specific ways which may be obscured by global frameworks of analysis. New Zealand’s settler-colonial history, institutional norms, and geo-economic location inform our experience of, and response to, past and ongoing globalising processes. Confining our analysis to a single, relatively limited population and geographical area also enables us to assess the

⁸ Globally, transaction costs have “fallen enormously since the 1930s” due to “[e]xtensive technological advances in both transportation and microelectronics” (Busse, 2003, p. 23).

⁹ Each of these categories is expanded upon in more empirical, descriptive terms in section 2. To ground our analysis in empirical evidence, we take ‘cultural flows’ in this paper primarily to mean the circulation of cultural texts and data across borders, though some attention is given to the global circulation of specific political and cultural ideas.

¹⁰ New Zealand sociologists Wendy Larner and Richard Le Heron (2002, p. 415) note that while “most theorisations of globalisation done from the core . . . are outlined as ‘the’ stories about globalisation,” in “our experience, which is non-core, we find ourselves discerning quite different forms of globalising processes. We argue that something quite fundamental is at stake in these different interpretations.”

changing direction and composition of global flows in New Zealand across different categories (trade, capital flows, migration, etc.).

Globalisation and lived experience

These definitional and analytical problems are exacerbated by the dissonance between the public's felt or lived experience of globalisation and its quantifiable economic realities. There is certainly a "perception that New Zealand is a great deal more open and integrated than the rest of the world" (Plater & Claridge, 2000, p. 1). Yet as Krugman (1995, p. 327) has observed, "many international economists regard the popular conviction that unprecedented globalisation has changed everything as considerably exaggerated."

But these popular perceptions of and narratives about globalisation nevertheless demand serious attention. In her *Reclaiming the Future*, Jane Kelsey (1999, pp. 2-3) neatly condenses popular anxieties over the interlacing of global and local cultural marketplaces, identities, and images in a New Zealand context:

New Zealanders' perceptions of the world, and our relationship to it, have changed. There is a sense of being more connected to the world. McDonald's and KFC now vie for custom with the ubiquitous fish and chips and meat pie. The difference goes beyond the food – New Zealanders have a more cosmopolitan self-image. Mum's hand-knitted jumpers have been replaced by sweatshirts with the 'Nike swoosh', and canvas sandshoes by Reeboks. Video recorders and pay-TV bring us blockbuster movies in the comfort of our living-rooms. Sky TV beams in sport from anywhere in the world – even the All Blacks have become a trade-marked commodity. New Zealanders fly to Sydney for the weekend or to Fiji for the week, and draw foreign money out of their home account through an automatic teller machine. . . . For people with money, all this can be liberating. For many ordinary New Zealanders it represents a threat to identity, jobs, communities, and the right to control their own lives.

There is much that we can recognise and identify with in Kelsey's narrative of global-local intersections in a New Zealand setting. Her account invokes many of the broad categories of globalising flows we discuss here – growing imports and trade, the expansion of global mediascapes, increased people mobility and short-term migration, and the intensification of cross-border capital flows – but makes them intelligible at a human scale.

But the desire to narrate globalisation at a quotidian, human scale comes at a cost. First, it requires the assumption of a universal national experience embodied in the figure of "ordinary New Zealanders": while sovereignty has often been invoked in discussions of globalisation in New Zealand, here not only national but *individual* sovereignty ("the right to control their own lives") is seen as fundamentally threatened by globalising processes.

Secondly, the nostalgic register of the passage, and its attendant claims to both individual and cultural memory ("Mum's hand-knitted jumpers"), is especially striking. We might think hard about the specific developments in trade policy and consumption

which this charming narrative registers – however, no one has to give up handknits because of cheaper imported clothing.

But whatever analytical problems Kelsey’s nostalgic idiom presents, her account nevertheless usefully recognises that the putative division between the ‘economic’ and ‘cultural’ dimensions of globalisation prevents us from recognising them as mutually constitutive.¹¹

Finally, Kelsey’s account depends upon a temporal divorce between the ‘now’ of globalisation and ‘then’ of a – somewhat dream-like – idealised period prior to current levels of economic integration.

1.4. How did we get here? Historicising global flows

Whatever the value of this narrative, its implicit sense of a radical historical rupture between current forms of globalisation and an earlier, more isolated past requires critical scrutiny. Since contemporary New Zealand emerged from “*the globalising British Empire and its circuits of trade, investment and migration*,” the sense of “*novelty and disjuncture with history*” we associate with contemporary globalisation alters the various ways in which “*New Zealand’s political economy and related representations of the nation have long been based on an accommodation to global demands and norms*” (Skilling, 2011, p. 73).

James Belich (2007, p. 4) has similarly argued that New Zealand commentators and scholars have at times tended to “*exaggerate the novelty and potentiality of the current wave*” of globalisation, or to mistake it for the first such wave.

Placing more recent developments in this long-term framework, we can see shifts in the composition of New Zealand’s trade between 1960 and 2010 as symptoms of broader changes in the country’s economic and imaginative geography. These were primarily imagined, from the late 19th century, as an agricultural outpost in an imperial world-system (as “*Britain’s Farm*”).

New Zealand has more recently been refigured as a node in the trade networks and capital flows of the Asia-Pacific region (see Lerner, 1998). The growing profile of Australia in New Zealand’s trade between 1960 and 2000 – and the diminishing presence of Britain in the same period – offers the clearest signal of these shifts (see section 2.1).

While in general the composition of New Zealand’s trade has diversified considerably, the shift towards regional – rather than imperial or metropolitan – export destinations perhaps bears out Michael Lang’s (2006, p. 907) pre-GFC observation that “*while levels of international trade continue to rise, such activity sharply gravitates toward regional, not global, circuits*.” The emergence of “*global regionalism*” of this kind suggests some of the ways in which globalisation is not making the world more “*flat*”, as is often supposed (Friedman, 2005), but rather “*far more uneven*” (McCann, 2009, pp. 290-1).

¹¹ For instance, the economic profile of culture (and private cultural spending) is significant: “In the year ended June 2007, it is estimated that New Zealand’s 1.57 million private households spent a total of \$2.84 billion on cultural items – an average of \$34.70 a week per household. This amounted to 3.6 percent of all household expenditure” (Ministry for Culture and Heritage, 2010).

But while it is important to take a historically sensitive approach to contemporary globalisation, it is nevertheless true that in New Zealand, as Belich (2007, p. 4) notes, “some forms of global interaction have reached unprecedented heights in recent years.” In 1956, New Zealand’s overseas exports weighed 12 million tonnes; by 2010, this figure had reached 29 million tonnes (Belich, 2007, p. 4; Statistics New Zealand, 2016) and, along with exports of services, represented 30.3% of GDP (see section 2.1 below).

Alongside the greater circulation of goods and the growing variety of goods available, people have also become increasingly mobile. In 1960, there were 39,000 short-term visitor arrivals in New Zealand (a measure of overseas residents arriving in New Zealand for a stay of less than 12 months); in 2010, there were 2.5 million (see section 2.3 below).

In the same period, capital flows increased substantially. New Zealand went from what one commentator has called “one of the most closed developed economies in the world” (Enderwick, 2012, p. 1) to relying more heavily on foreign direct investment (FDI) as a source of fixed capital formation than any other developed country (see section 2.2 below).

1.5. Cultural circuits – still on the rise?

Have cultural transactions between New Zealand and the rest of the world grown at the same pace as the mobility of goods, capital, and people?

In her narrative, Kelsey (1999, p. 2) draws links between the apparent emergence of a global mediascape in the latter half of the twentieth century and New Zealanders’ “more cosmopolitan self-image.” While recognising the truth of Appadurai’s (1996, p. 27) assertion that the current global cultural field involves “interactions of a new order and intensity,” any assessment of New Zealand’s specific position within these cultural networks requires historical context and perspective.

An “import-dependent” culture

The renewed intensity of these interactions may be undeniable, but New Zealand has long nurtured deeply-held anxieties about the overwhelming dominance of global influences in the space of local culture.

In 1988, Ian Cross, a former chief executive of the Broadcasting Corporation of New Zealand, wrote that in the 1960s he had been “an unhappy New Zealander”:

The teaching of schools and universities was devoted to making the country a museum of imported taste and anaesthetising its indigenous impulses and spirit ... For all the legal trappings of our sovereignty and independence, New Zealanders were unwittingly being represented and even betrayed in their own land by being taught to think that everything that was really important and interesting originated overseas. (in Dunleavy & Joyce, 2011, p. 17)

Whatever the limits of this personal account of national ‘betrayal’, such anxieties of influence should qualify claims about the perceived novelty of global cultural flows in our own era.

Similarly, Fairburn (2006) helpfully historicises our high current levels of cross-border cultural flows as a continuation of what he calls the "*import-dependent culture*," which developed in New Zealand throughout the late-19th and 20th centuries. In this account, New Zealand was already, by the first half of the 20th century, a node in a network of cultural reception of films, radio programmes, books, and recorded music produced in Australia, the United States, and Britain.

In the late 1950s, New Zealand had some of the highest cinema attendance rates in the world, at 16.6 admissions per capita each year (Department of Statistics, 1961, p. 392). This particular receptiveness to global popular cultural flows produced a local culture which is best described as a "pastiche dominated by imported elements" (Fairburn, 2006, p. 148).¹² This network of cultural reception, even in the early 20th century, Fairburn (2006, p. 151) claims, "*probably made New Zealand the most globalised society in the world.*"

Despite Fairburn's use of the term "import" in his descriptions of cultural transaction and reception, what is especially striking in his account (for our purposes, at least) is the *lack* of correspondence between the properly economic and cultural dimensions of twentieth-century globalisation. While New Zealand's trade policy was turned decisively away from Australia towards Britain until the 1960s, Fairburn (2006, p. 156) produces a range of empirical evidence to highlight the importance of trans-Tasman cultural transactions – "*mundane, ongoing, and undramatic*" as they were – in composing the New Zealand cultural field. For the period 1930s-80s, he claims that of the approximate total of 255 radio serials broadcast in New Zealand, 206 were Australian made (compared to 9 from Britain and 21 produced in New Zealand).

Some incongruity also emerges here between so-called 'high' and popular cultural flows. Despite the relative ubiquity of American and Australian popular cultural texts, 'prestige' forms of cultural consumption still primarily followed metropolitan trends: Britain remained New Zealand's "*leading source of imported books*" up until the 1960s (Fairburn, 2006, p. 155), although this began to change as British firms began to establish local branches in the 1960s and 1970s, many of which now belong to multinational publishing conglomerates (Caffin, 2014).

Even under today's conditions of deep trans-Tasman economic integration (realised in both Closer Economic Relations and the Trans-Tasman Travel Arrangement), geographical and economic proximity doesn't necessarily translate into a free exchange and circulation of ideas or cultural products. As Lydia Wevers (2001, p. 75) notes, "*buying Australian books in New Zealand or New Zealand books in Australia is still and has been for at least 30 years very difficult.*" In at least one respect, then, New Zealanders still "*like our imported culture to come from traditional metropolitan sources, to bear the imprint of a larger society*" (Wevers, 2001, p. 76).

From the 1990s, especially, New Zealand's position in globalised cultural flows was increasingly reflected and negotiated in local art and literature, to varying political and critical ends: the poet and novelist Ian Wedde (1995, p. 172) complained of "being a nationalist donkey, doomed to stagger under an unfair burden of 'national identity'."

Patricia Grace's novel *Dogside Story* (2001) takes as a key theme the arrival of a globalised world economy (particularly in the form of so-called 'new services' trades

¹² In addition to remarkably high consumption of popular culture produced in these countries, Fairburn (2006, p. 145) finds antecedents for familiar figures of national culture – the figure of "man alone," in particular – in Australian cultural nationalism and stories by the American writer James Fenimore Cooper.

like tourism) in local, seemingly isolated indigenous communities. At the same time, the desire to export local cultural products on the international market was being expressed in cultural policy: in May 2000 the Labour government announced a \$86m “*Cultural Recovery Package*” in order to “[enrich] *New Zealand’s cultural framework while also creating employment and economic opportunities*” (New Zealand Government, 2000). These shifts towards cultural production with an explicitly global orientation throughout the 1990s became a cause of considerable anxiety among critics concerned about the apparently flagging fortunes of recognisably-local artistic expression.¹³

Political ideas

New Zealand’s political and cultural identity has often been rendered in exceptionalist terms, as that of a “*destiny apart*” (Sinclair, 1985). But even a cursory look at the cultural data of the last century suggests a highly receptive, if negotiated, approach to international influences.

In addition to cultural texts and products, political ideas which emerged initially in British, North American, and Australian contexts have long filtered through New Zealand society. These range from the conservative to the progressive, from the emergent temperance movements (so-called “*wowserism*”) of the late 19th century to the political programmes of first- and second-wave feminisms (Fairburn, 2006, p. 147).

More recently, New Zealanders’ engagement in the global counter-cultural opposition to the Vietnam War was made clear by the significant protests which greeted US Vice President Spiro Agnew upon his visit to New Zealand in January 1970 (Ministry for Culture and Heritage, 2016).

In government policy, too, many of the most influential and transformative political ideas of recent decades – especially those adopted by the fourth Labour government – had global, largely American origins. The introduction of Chicago School free market doctrines to New Zealand has accordingly been characterised by Easton (1997, p. 219) in terms of the “*importation of foreign ideas without a process of national intermediation.*” Though Easton stresses that for the most part the adoption of ideas from overseas is undertaken voluntarily (if uncritically), this account perhaps underestimates the ways in which a globalised economic and cultural environment informs and structures New Zealand’s political agency.

Time-space compression

Despite its obvious value here, we might note that Fairburn’s account problematically emphasises and assumes cultural points of origin, instead of considering how, in a globalised cultural economy, political and aesthetic movements might instead emerge synchronously in a global, reciprocal, and mutually-dependent fashion. As the speed of cultural interactions across space accelerates, these claims about the origins of culture become harder to maintain and substantiate.

The changing pace, composition, and volume of these flows of ideas and culture have been driven by continued improvements in global media and communications, from the introduction of airmail services to Europe in the 1930s to the introduction of television to New Zealand in 1960, and the opening of a satellite earth station near

¹³ See Evans (2000) for a frequently-cited – and highly controversial – example.

Auckland in 1971. Much has been made, in the theoretical literature on globalisation, of what Harvey (1990) calls “*time-space compression*.”

Yet as Belich (2007, p. 4) observes, these developments, and the dramatic reductions in real communication costs which they have enabled, have been widely felt at the level of lived experience:

In 1956 it cost several hundred of today’s dollars to instantly send a page of information between New Zealand and London by telephone or telegraph. Now, it costs a fraction of a cent – to London or Reykjavik – at least for the 69% of New Zealanders connected to the internet. ... The flows of people and information have skyrocketed. Indeed, as far as information is concerned, distance has been virtually abolished.

If the most recent wave of globalisation can be largely attributed to steep declines in communication costs globally since the 1930s (Busse, 2003), cultural flows have only continued to intensify. While flows of trade and cross-border capital are flattening, it has been estimated that global cross-border bandwidth has grown 45 times larger between 2005-14 (Manyika et al., 2016, p. 4).

1.6. Globalisation and localisation

Yet can we regard this explosion of data and global online exchange as evidence of the emergence of a flat, globalised cultural or public sphere?

Rodrik (2007, p. 197) observes that even the internet, “*the epitome of technology-driven internationalisation, remains parochial in many ways,*” and points to the adoption of local branding by multinational businesses (his key example being Amazon.co.uk). Similarly, TradeMe, founded in 1999, offers a local New Zealand variation on the global online trading concept perfected by American multinational eBay. (It noteworthy, however, that New Zealand may be an exceptional case in this regard, as it is one of the few markets in which eBay has been unable to gain any substantial foothold.) These complex relations between localisation and globalisation become increasingly clear in business during this period, since, as Nixon and Yeabsley (2001, pp. 59–60) argue, globalising forces prompt nation states and firms to draw upon the “*distinctiveness of localisation*” in marketing their products on the global market.

One often-heard complaint about economic integration in New Zealand is that it produces an increasingly flat, homogenous cultural field (Belich, 2007; Evans, 2000; True, 2004). But globalising processes involve not only the possibility of homogenisation but the production of local difference – a tension evident in the reorganisation of local tourism under a unified global brand, “100% Pure New Zealand,” in 1999.

True (2004, p. 202) uses this branding exercise alongside a number of other New Zealand case studies in order to argue that globalisation, far from engendering cultural homogeneity in the marketplace, in fact “*impels local actors to take advantage of – and indeed reinforce – their distinctiveness in the world.*” Contemporary economic nationalism and economic globalisation are thus best understood as “*mutually reinforcing processes*” (True, 2004, p. 203).

1.7. Conclusions – a complex process keeps on keeping on

These examples suggest that globalisation – far from constituting a singularly disruptive, linear, or homogenising force – instead involves a more complex interplay of global and local identities, markets, ideas, and images across time. Globalisation, as Appadurai (1996, p. 17) reminds us, is best understood as “*a deeply historical, uneven, and even localizing process.*”

The contradictory quality of this description underlines the need to develop accounts of globalisation which are not only sensitive to its historical precedents but attuned to its highly uneven contemporary manifestations. It is the unevenness and historical reach of globalising forces which we must keep in mind when assessing overly-hasty claims of “de-globalisation,” or even a partial retreat from global integration.

Despite fears over signs world trade and capital flows are stagnating, the presence of global cultural texts, ideas, and images in the space of the local remains a dominant and persistent feature of everyday life. At the same time, New Zealanders have become accustomed to an ever-growing variety of goods and services.¹⁴

The expansion and variegation of markets available to New Zealand consumers has perhaps only been outpaced by the expansion of the global mediascape, and the instant circulation of texts, goods, and ideas which the emergence of the internet has made possible. Yet despite the hyperbole often employed in discussions of globalisation, it is rather, to borrow from Fairburn (2006, p. 156), the increasingly “*mundane, ongoing, and undramatic*” quality of global flows in New Zealand which makes them both elusive and important objects of analysis.

¹⁴ For a discussion of how the rise in world trade has been accompanied by “a dramatic rise in imported varieties,” see Broda & Weinstein (2006).

2. Background: by the numbers

2.1. Trade

Trade, as Nixon and Yeabsley (2007, p. 152) point out, is “*the economic lifeblood of most small states and New Zealand is no exception.*” New Zealand is thought of as a relatively open economy (Plater & Claridge, 2000, p. 1), but in any case it is important to qualify this perception in terms of its relative recency. In the post-war period, the primary objective of New Zealand trade policy was towards trade diversification through protectionism, including the introduction of import licensing for manufactures.

The removal of these protectionist measures was hastened in the 1980s, with the signing of Closer Economic Relations (CER) with Australia in 1983 and reductions in tariffs by the fourth Labour government beginning in 1984 (Nixon & Yeabsley, 2010). New Zealand has also been active in pursuing bilateral, regional, and multilateral trade liberalisation. By the most frequently cited measure of integration in world trade – trade as a share of GDP – New Zealand has become considerably more integrated with the global economy since the 1960s (see Table 1, exports only).

Table 1 Exports of goods and services: New Zealand

As a percentage of GDP

1960	1970	1980	1990	2000	2010
12.2* ¹⁵	22.1	28.8	26.8	35.7	30.3

Source: OECD (2017) (*Estimate only)

As the relative volume of trade grew during the 1990s, the composition of New Zealand’s exports (and trade profile) continued to move towards ‘new services’ trades, especially tourism and education, and this shift has contributed to continued growth in the sector. Service exports in 2010 reached US\$11.57b, compared to \$5.24b in 2000 (World Bank, 2017).

Krugman (1995, p. 334) identifies the global fragmentation of value-added chains – in which a given consumer good may, in the process of its international production and assembly, be “exported many times” – as a crucial distinguishing feature of contemporary world trade and globalisation. This is one area in which New Zealand remains substantially less integrated than many other economies of its size, partly due to “geography and a relatively high specialisation in products with a typically high domestic value-added content, including agriculture and food products” (OECD & WTO, 2015).

The Global Financial Crisis led to a sharp deceleration in the growth of global trade relative to GDP, though 2010-11 saw an almost equally sharp recovery (Mallaby, 2016, p. 9). New Zealand’s exports as a percentage of GDP declined overall from 2000 to

¹⁵ Figures for 1960 are tentative estimates only, based on the Statistics New Zealand long-term data series (accessed January 31, 2017).

2010, and this figure has continued to fall since, with exports accounting for 27.8% of GDP as of 2015. New Zealand’s integration in global value chains is also still recovering from the crisis (OECD & WTO, 2015).

Far to near – from Britain to Australia

While for much of the 19th century Australia had been New Zealand’s most important export market, the introduction of refrigerated shipping in 1882 shifted the focus of trade to Britain. By 1960, Britain remained at the centre of New Zealand’s trade policy. New Zealand and Australia, to borrow Bill Brown’s phrase, positioned themselves “back to back in the Pacific’, *New Zealand trading through Panama, Australia through Suez*” (Hoadley, 1999, p. 178). Just over half of New Zealand’s exports in 1960 were to the UK, compared with just under 5% to Australia (Table 2).

In 1961 Britain announced its intention to join the European Economic Community (EEC). Though, in the event, it took another 12 years to get there. But the proclamation changed the local landscape.

The signing of the New Zealand-Australia Free Trade Agreement (NAFTA) in 1965 reflected a broader change in the orientation of New Zealand’s trade policy. Now we looked to Australia partly as a pre-emptive measure against the prospect of further European integration (Nixon & Yeabsley, 2001, p. 131). Britain’s accession into the EEC was finalised in 1973, and this geopolitical shift continued to reshape New Zealand’s economic geography in subsequent decades.

Table 2 Destinations of New Zealand’s exports: UK and Australia

As a percentage of total exports

	1960	1970	1980	1990	2000	2010
UK	52.9	35.5	14.4	7.2	5.9	3.9
Australia	4.5	8.0	12.2	19.7	21.2	23.7

Source: Hawke (1985), Statistics New Zealand

By 1980, the share of exports to the UK had dropped to 14.4%, while Australia accounted for 12.2% of exports (Hawke, 1985, p. 220). Closer Economic Relations (CER) with Australia came into force in 1983, and by 1990 Australia accounted for 20% of New Zealand exports.

2.2. Moving money – capital flows

In New Zealand there has been significant public discourse around capital flows but the debate has been largely confined to disagreement over acceptable levels of foreign investment in land (Kalderimis, 2013, p. 65), though some popular accounts have been devoted to examining and criticising growing capital flows more broadly.¹⁶

Prior to the economic reforms of the mid-1980s, and their promotion of New Zealand as an attractive destination for foreign investment, New Zealand was “one of the most

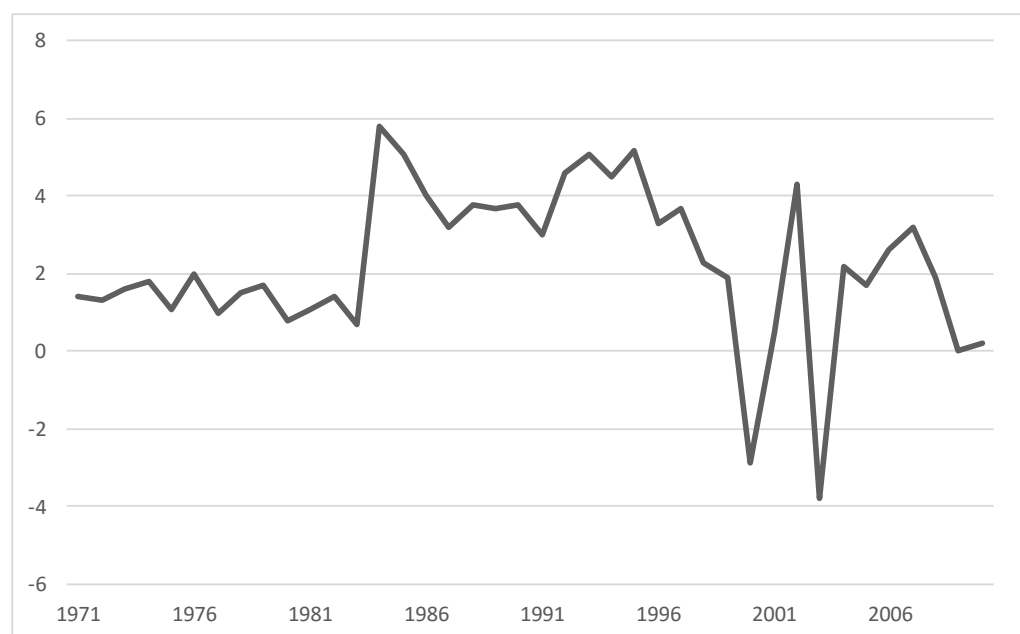
¹⁶ See, for example, the chapter on overseas investment in Kelsey (1999).

closed developed economies in the world” (Enderwick, 2012, p. 1). Until 1970, much of the foreign direct investment (FDI) in New Zealand was greenfield, and intended to bypass protectionist restrictions on imports (Scott-Kennel, 2004, p. 41).

As with trade, the growth of cross-border capital flows was hastened through the adoption of a liberal international investment regime in the 1980s and 90s. The government’s ambition to boost FDI flows was signalled in the 1991 Budget, and through the establishment of an FDI advisory group (Larner, 1998, p. 607). By the mid-1990s, as Scott-Kennel (2004, p. 41) notes, New Zealand relied more heavily on FDI as a source of fixed capital formation than any other developed country. This dependence is partly due to the relatively shallow capital base available to businesses domestically – a fact underlined by New Zealand’s relatively low FDI outflows.¹⁷

Figure 2 Foreign direct investment in New Zealand, 1971-2010

Net inflows, as a percentage of GDP



Source: World Development Indicators

Throughout the 1990s, New Zealand’s dependence on overseas capital increased considerably (Woolford, Reddell, & Comber, 2001, p. 6), and in 2000 the UN Conference on Trade and Development ranked New Zealand first in their “Transnationality Index,” a measure based primarily on FDI flows (UNCTAD, 2000). The growth in capital flows has not escaped regulatory control: in particular, the Overseas Investment Act 2005 was intended to provide protection to “sensitive” assets and land while still preserving and enabling a liberal foreign investment regime.¹⁸

The source of these flows is instructive, and reflects wider regional tendencies also expressed in trade and migration: as of the year ended March 2016, Australia was

¹⁷ This is, according to Frankel & Yeabsley (2014, p. 27), one area in which the New Zealand economy is “less globally interconnected than some may wish.”

¹⁸ Note that overseas investment in land is still foregrounded here. For discussion on the need to recognize and accommodate locally-specific cultural attachments to land in a regulatory context, see Frankel & Yeabsley (2014).

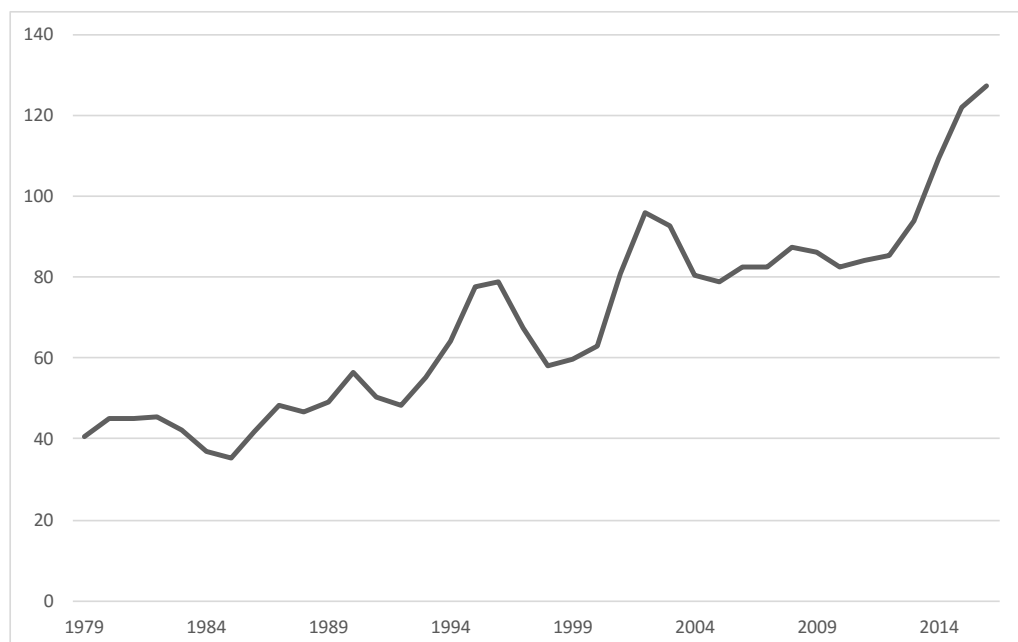
responsible for just over half (51.48%) of the stock of FDI in New Zealand (“Statistics - Invest,” 2016).

2.3. Moving people – mobility and migration

While the analytic use of net Permanent Long-Term (PLT) migration flows is limited by their tendency to “change in scale and direction very quickly” (Hawke et al., 2014, p. 17), the changing scale and direction of these flows does at times correspond with significant developments in immigration policy and changes in economic factors (see Figure 3).

Figure 3 Permanent and long-term arrivals, 1979-2015

In thousands



Source: Statistics New Zealand

For example, tighter criteria for assisted immigration from Britain saw permanent and long-term (PLT) migration decline from 26,400 in 1957 to 21,300 in 1959. The introduction of the Trans-Tasman Travel Arrangement in 1973 had a similar effect on these flows. Net migration for 1980-9 was -122,500, while net outflow to Australia rose significantly (Statistics New Zealand, 2010, p. 6). Trans-Tasman migration was the key driver of net migration patterns in this period (Reserve Bank of New Zealand, 1986, p. 335).

In 1991, the Immigration Amendment Act introduced a points-based system for setting and controlling migration targets. Adjustments to the system were made in 1995, including the introduction of stricter English language requirements, but the number of overseas-born New Zealand residents continued to rise (see Table 3). The number of people born overseas and usually living in NZ reached 17.5% in 1996, compared with 15.8% in 1991. The number of overseas-born reached 22.9% in 2006, compared with 19.5% in 2001.

Table 3 Overseas-born population

As a percentage of New Zealand's total resident population

1991	1996	2001	2006	2013
15.8	17.5	19.5	22.9	25.2

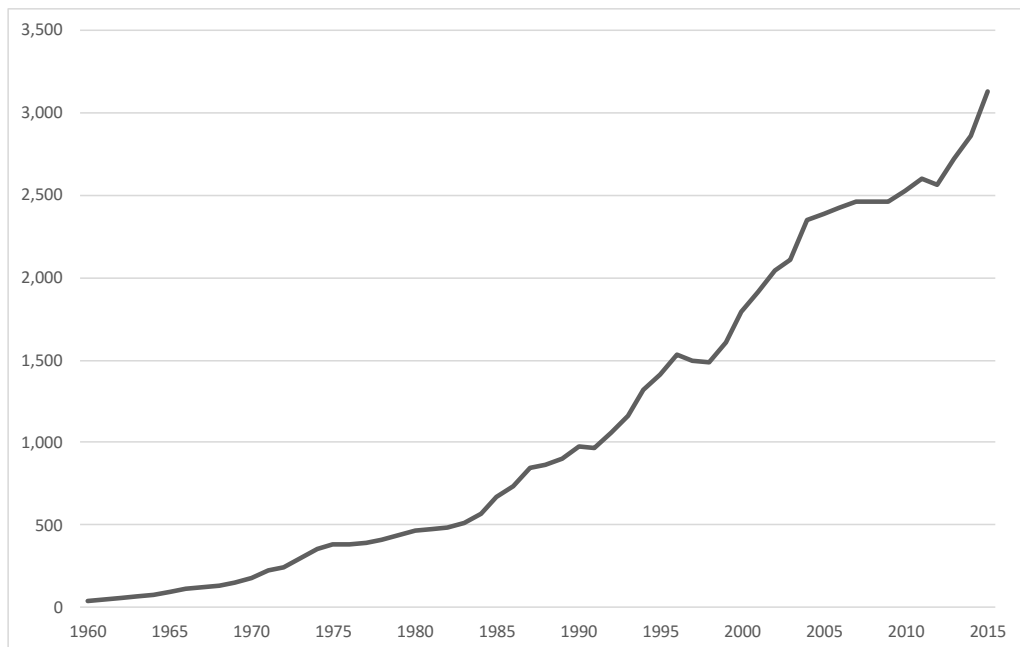
Source: Census data, Statistics New Zealand

Growing permanent and long-term migration, however, does not clearly distinguish the current period of globalisation from earlier waves of settlement during and after colonisation. For this, other measures of mobility are needed. But these can often be difficult to find: as Lerner (1998, pp. 609-10) notes, one feature of globalisation in New Zealand has been *“the emergence of new ‘globalised’ patterns”* of labour involving a *“growing pool of highly skilled professionals and managerial workers who move within and between the international office networks of multinational corporations.”* But as these patterns are made up of *“temporary movements rather than traditional settler migrations,”* they can prove *“difficult to document.”*

A more useful measure of global mobility, for our purposes, is the growth in temporary visitors (including tourists) to New Zealand (see Figure 4).

Figure 4 Visitor arrivals, 1960-2015

Overseas residents arriving in New Zealand for a stay of less than 12 months (in thousands)



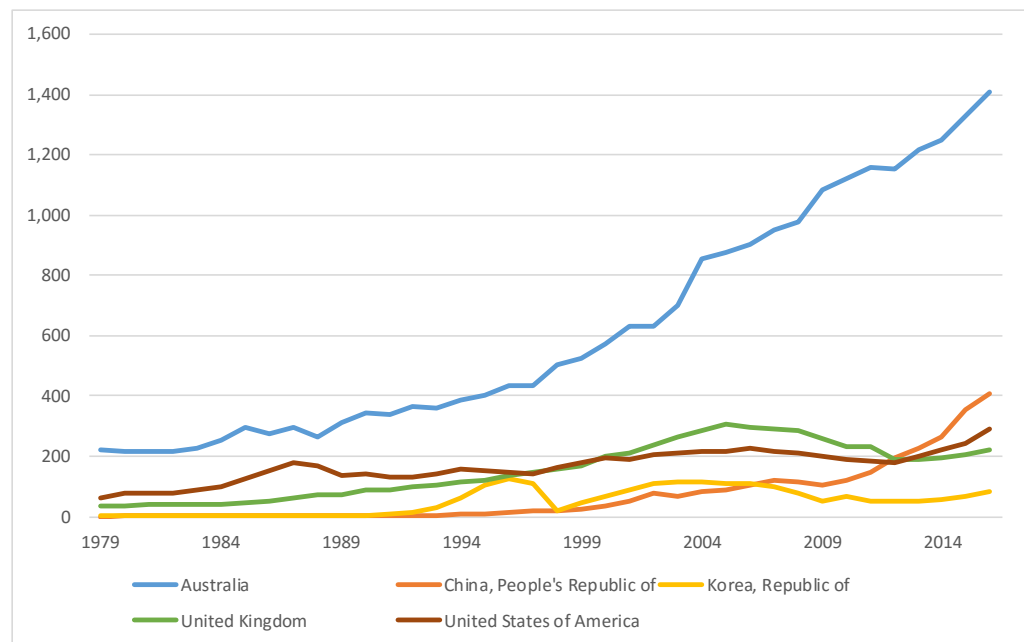
Source: Statistics New Zealand

The growth in short-term international movements has been enabled and hastened by developments in the period covered here. In 1963, the British Overseas Airways Corporation began a twice-weekly jet service between London and NZ (Ministry for Culture and Heritage, 2012), and, in 1966, Auckland International Airport was officially opened.

Key policy changes have had a significant effect on these flows. The Trans-Tasman Travel Arrangement was introduced in 1973, and the composition of temporary visitor flows – as with trade and capital flows – has since been dominated by ongoing trans-Tasman integration, though the emergence of China in these figures is also worth noting (see Figure 5).

Figure 5 Visitor arrivals by country of residence, 1979-2015

Overseas residents arriving in NZ for a stay of less than 12 months (in thousands)



Source: Statistics New Zealand

In 1999, Tourism New Zealand commissioned the advertising agency M&C Saatchi to design a global advertising campaign. This resulted in the “100% Pure New Zealand” brand (McClure, 2010). The continued growth of tourism since the 1990s – a decade in which New Zealand tourism revenue doubled from \$1.9 billion to \$4 billion -- can be partly attributed to this kind of public spending towards the consolidation of national tourism marketing under a unified global brand (True, 2004, p. 207).

2.4. Moving ideas – cultural flows

Of the categories covered by this study, cultural flows are certainly the most elusive and difficult to quantify. Section 1.4 above gave a broad, qualitative overview of cultural globalisation in New Zealand, and sought to lend historical perspective to accounts which emphasised recency or novelty in their descriptions of contemporary, globalised cultural transactions. This brief section is intended to complement this analysis with quantitative evidence of the changing direction and composition of cultural flows in New Zealand.

Broadcasting is not only one of the most quantifiable forms of cultural production and reception, but it is one of the most important in present-day New Zealand. In 2006/07,

broadcasting accounted for over a third (35%) of total household spending on culture (Ministry for Culture and Heritage, 2010, p. 7).

The number of local content hours on television gives some indication of the continued dominance of imported, global cultural products. In 2015, local content comprised 36% of prime-time free-to-air television, but the number of *first-run* local content hours decreased by 4% to make up 17% of the broadcast schedule, continuing an overall decline in first-run local television observed each year since 2006 (NZ on Air, 2016). However, the growing fragmentation of media consumption, and the shift towards online content distribution among both broadcasters and publishers, necessarily complicates our existing ways of measuring the volume of local content.

Lydia Wevers' (2001, p. 76) claim that New Zealanders still prefer "*our imported culture to come from traditional metropolitan sources*" – and therefore to "*bear the imprint of a larger society*" – still largely holds true. International literary imports continue to dominate the market for popular and literary fiction in New Zealand. A recent report by the New Zealand Book Council suggests that, while sales of local non-fiction are comparatively strong, New Zealand fiction makes up only around 5-6% of all fiction purchased in New Zealand (Morris & Robertson, 2016, p. 4).

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