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Methodological and Ideological Options

Measuring Localisation Nationally to Form a Global Index

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ABSTRACT

Localisation is an important sustainability strategy that may reduce the harmful socio-ecological effects of economic globalisation. This article describes the development of a localisation metric set, and the formation of a composite, multi-criteria global localisation index (GLI). The index comprises 103 countries from across the global North and South, for which the required data was available. In forming the GLI, secondary source data was gathered according to localisation-expert determined metrics, which were then weighted, standardised, scored and ranked. Bhutan, which tops the GLI, may do so due to the prioritisation of socio-ecological health and participative democracy there, as in many Latin American countries that also achieve high localisation scores whilst minimally compromising sustainability thresholds. The GLI may assist those seeking to strategise localisation as it identifies the most localised places, which may serve case study purposes.

1. Introduction to Measuring Localisation

Localisation involves self-reliant regions providing for their own needs from predominantly local resources, decreasing the need for international trade, globalised production, and centralised economic activity and governance (Abdallah et al., 2009; Jackson, 2012; McCartney and Hanlon, 2009; Norberg-Hodge, 2000). This may facilitate self-reliance, socio-ecological health, connectedness and increased equality, as unfair advantages between regions and/or nations are decreased and local populations are more able to be self-determined (Cavanagh and Mander, 2004; Knight and Rosa, 2011; Norberg-Hodge, 2000; Wilkinson and Pickett, 2009). In turn, socio-ecological threats may decrease as a result of reduced socio-ecological exploitation (Norberg-Hodge, 2000; North, 2010; The Royal Society Science Policy Centre, 2012, p. 9; WWF, 2010, pp. 4–5). As the main aims of sustainability, or "Meeting the needs of the present without compromising the ability of future generations to meet their own needs" (WCED, 1987, p. 87), include socio-ecological protection and inequality reduction, and as localisers believe that localisation is conducive to self-reliance, socio-ecological health, connectedness and increased equality, they believe it is a strategy with great potential for the enabling of global sustainability improvements (for examples see De Young and Princen, 2012; Douthwaite, 1996a; Hopkins, 2010; Max-Neef, 2010; Norberg-Hodge, 2001; North, 2010; Trainer, 2012).

Critics claim that localisation may be defensive and conservative, and that a localisation 'default' may obscure more socially and environmentally beneficial options (Born and Purcell, 2006; Hinrichs, 2003; Winter, 2003). However North (2010), Hinrichs (2003) and DuPuis and Goodman (2005) outline a diverse, reflexive form of localisation, or positive localisation, as opposed to a defensive, unreflexive or autocratic form of isolationist or protectionist localisation, or negative localisation. "Localisation is not about isolating communities from other cultures, but about creating a new sustainable, equitable basis on which they can interact" (Norberg-Hodge and Mayo in Douthwaite, 1996b, p. ix). De Young and Princen (2012, p.xxi) state, "Positive localization…is a process for creating and implementing a response, a means of adapting institutions and behaviors to living within the limits of natural systems. Place-based localization includes institutions at the regional, national, and international levels…".

A specific definition of 'the local' is impractical, impossible, and non-existent, as localisation is context dependent and varies for differing regions and purposes such as the type of goods or services produced, and the social and ecological context (De Haan, 2000; De Young and Princen, 2012; Frankova and Johanisova, 2012). Rather, scale should be determined within the context of positive or reflexive localisation, which may be generally defined as a sustainable, socially-just process that facilitates healthy local communities, economies and environments through local governance, ownership, trade, and resource utilisation to meet essential needs within a radius of political, economic and resource dependence that is as small as practicable for any particular purpose, and that diminishes with distance (Olivier et al., 2016b). When envisaging localisation, ensuring that the focus shifts from the global toward the most practicable, sustainable, local scale for any purpose is then the main criteria for determining 'the local'.

By contrast economic globalisation is, "…the ever-increasing integration of national economies into the global economy through trade

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and investment rules and privatisation, aided by technological advances" (Hines, 2003, p. 1). In addition to resulting in economic and technological benefits, economic globalisation has long been described as destructive of local cultures and environments, and as a result to be causing a dangerous socio-ecological crisis whereby local, self-reliant economies, communities and environments decay or collapse as they are displaced by monetary economies, media and consumer ideologies (for examples see Doyle, 1998; Holmgren, 2009; Keynes, 1933; Mander and Goldsmith, 2001; Max-Neef, 2010; Norberg-Hodge, 2008; Schumacher, 1973; Shiva, 2005; Trainer, 2010). Due to these effects, many claim that sustainability strategising based on economic globalisation is ineffective and destructive, stating the need for investigation of alternative measures such as localisation (Cavanagh and Mander, 2004; Curtis, 2003; Douthwaite, 2004; Frankova and Johanisova, 2012; Martinez-Alier, 2008; Meadows and Randers, 2004; Norberg-Hodge et al., 2011; O'Riordan, 2012; Shiva, 2005).

With regard to localisation literature Hopkins (2010, p.17) notes, there is "…little that pulls it together to look at how, strategically, it would apply to the intentional relocalisation of one settlement". Clarification of what localisation looks like in practice may assist in making the concept more accessible for such investigation. This may be assisted with localisation measurement and indices, enabling identification of localised places.

Nardo et al. (2005) explains that the structure of an index should be well defined by determining a valid, comprehensive set of indicators. Additionally, the weighting of metrics according to expert opinion is common (Nardo et al., 2005), and with regards to localisation measurement this may assist avoiding the fate of sustainability assessment whereby the 'cherry-picking' of convenient metrics and inappropriate weightings, has enabled outcomes that achieve economic advantage for some rather than and at the expense of socio-ecological protection for all (Huge et al., 2012).

Composite indices such as those used for sustainability or wellbeing assessment, serve the purpose of guiding policy or forming an overall picture, rather than providing definitive, accurate measurements (Prescott-Allen, 2001). Indeed all measurements are subjective, and in relation to sustainability and wellbeing assessment it is impossible to accurately and quantitatively capture a precise end state that is by definition a process of change (WCED, 1987). Rather, as described by Prescott-Allen (2001, p.10) sustainability assessment provides "a framework for reflection and debate". This debate regards the relationships between people, and the relationship between people and the environment. As localisation is always context dependent (De Haan, 2000; De Young and Princen, 2012; Frankova and Johanisova, 2012), similarly with localisation it seems useful to provide a reflective framework rather than attempting a definitive measure.

Localisation in its regional or micro-regional form is best measured at this scale (Olivier et al., 2016b). However localisers describe the need for countries to be more self–reliant so that regions can be self-supporting, rather than concentrating local economic activity into capital cities suited to economic globalisation and a heavy reliance upon imports (Mander and Goldsmith, 2001; Norberg-Hodge, 1992). As self-reliant countries are enabling of localisation at a regional or micro-regional scale, it then seems relevant and useful to analyse countries at the national scale, to determine how conducive they are to localisation. Including metrics such as those that capture the level of imports then provides an indication of a countries' level of dependence on other countries, the lower the dependence the more conducive the conditions are in that country for its' regions to be localised.

This article describes the development of an expert-informed, comprehensive localisation metric set, and using this to form a global localisation index (GLI). The index builds on research by the same authors describing the development of localisation metrics using expert-guidance (Olivier et al., 2016a) and the forming of a regional scale localisation index for Bhutan (Olivier et al., 2016b), by exploring localisation measurement at a national scale.

2. Interviewing Localisation Experts to Determine Localisation Metrics

As there is no mention of localisation measurement anywhere in the literature, localisation experts were interviewed to determine localisation metrics and their weightings, as opposed to arbitrary author determination (Olivier et al., 2016a). The experts were selected on the basis of three criteria. Each has: wide recognition (within their field); a long history of up to 4 decades of localisation experience; and is currently active in their field. The experts included: Localisation pioneer Helena Norberg-Hodge, widely recognised for long promoting localisation as a means of countering the socio-ecological impacts of globalisation; Sustainability pioneer and 'voluntary simplicity' advocate Ted Trainer; Thomas Princen, co-author of 'The Localization Reader' and co-founder of the 'Alternative Consumption Research Community'; Rob Hopkins, founder and figurehead of the Transition Towns movement; Michael Shuman, Director of Research for Cutting Edge Capital and for the Business Alliance for Local Living Economies (BALLE), and a Fellow of the Post Carbon Institute; and Judy Wicks, Cofounder and Board Chair Emeritus for BALLE, and former owner of the White Dog Café, internationally acclaimed for its socially and environmentally responsible business practices.

General localisation and sustainability-focused interview questions, were used to provide context for and elaboration of the terms and concepts identified by the interviewed experts in their response to interview Question 5, "What metrics do you believe might best represent localisation for measurement purposes?" (Appendix A). Little distinction was made between regional and national level metrics, the experts referring indiscriminately to both national and regional level measurement in their responses. Analysis focused strongly on interview Question 5, which is the only answer from which concepts and words to measure localisation were taken. The purpose of this was to ask the experts to narrow down their extensive understanding of localisation, so that they themselves would collectively determine the essential elements that should be included in a metric set. Identification of the most important localisation metrics, or qualities that should be measured, was then asked directly of the experts following the thematic analysis process described by Clarke (2013, p.121) (Olivier et al., 2016a).

Counting was used to ascertain the specific themes, words or concepts most identified by all of the experts. These most identified metrics or localisation qualities were then included in the metric set, with sub-themes or sub-metrics identified by the majority of interviewees also included (Table 1). This resulted in the metrics or localisation qualities most identified by all of the experts, being utilised to form a localisation metric set. The interview responses regarding the metrics or localisation qualities identified by the greatest number of experts were then qualitatively analysed to clarify their exact meanings (Olivier et al., 2016a).

Interview responses were valuably expanded using relevant literature by the interviewees and other authors, to clarify the exact meanings and further relevant information regarding the suggested metrics. Where the experts were unsure of metrics that would best capture important localisation qualities, general interview responses and relevant literature were used to identify these and to determine submetrics that would best represent the metrics (Olivier et al., 2016a). The number of experts suggesting each metric is recorded in Table 1, along with the suggested and literature identified submetrics.

After coding and clarification of the expert-suggested metrics and localisation qualities that are important to capture for the purposes of localisation measurement, a set of six localisation metrics was determined (Olivier et al., 2016a). In order of perceived importance as