On the Disadvantages of “Global South” for Latin American Studies*

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This article reconstructs the genealogy of the figure of the “global south” from the 1970s to current uses in policy, academic, and political discourses in several countries, to point out its limitations and its unintended ideological consequences. It discusses its connections with similar earlier figures like Antonio Gramsci’s “southern question” and the “third world,” establishing continuities and differences. After tracing the uses of the “global south” in several disciplinary fields, it contrasts them, through specific examples, with the way in which scholars in Latin American Studies have analyzed the history of capitalist globalization and the social and political responses to it more effectively.

Key words: global south; third world; globalization; history; Latin America; Latin American Studies

But contrary to all the historical ways of considering the past, they do come to full unanimity on the following principle: the past and the present are one and the same, that is, in all their multiplicity typically identical and, as unchanging types everywhere present, they are a motionless picture of immutable values and eternally similar meaning.

Friedrich Nietzsche, On the Uses and Disadvantages of History for Life

1 Introduction

A recent editorial essay in the Latin American Studies Association journal proposed to “reimagine” Latin American studies beyond the boundaries of the traditional “area studies” by following the general trend in the humanities and social sciences towards global and transnational approaches. Good examples of this geographic opening are the oceans that flank the Americas—the perspectives from the “Black Atlantic” and the Asian diasporas connecting Latin America to the Pacific Rim. But the authors suggest an even wider, already ubiquitous, and yet still nebulous term: the global south. Like its predecessor the “third world,” they argue, this term would have the advantage of enabling us “to understand overlaps and divergences in regions shaped by histories of the appropriation,

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colonization, and extraction of their knowledges, resources, and ways of life” (Bigelow and Miller Klubock 2018: 574). More than just a transnational geography, “global south” would be a conceptual tool to question “northern” perspectives. For instance, sociologists of race in the US read “global south” authors to critique the imperial and racial assumptions underlying their own discipline, which under this light appears no longer as universal, but as “provincial” (Go 2018, 2016). The figure of the “global south” invites us, thus, to take on a relevant and necessary intellectual task: to reconsider Latin America within a global history of subjugation, and to do it beyond Eurocentric epistemologies.

Turning the old “areas” of the world into a single mega-region of post-colonies, however, requires a conceptual leap. What kind of figure is the “global south” and where does it come from? How concretely could it serve us to understand “overlaps and divergencies” between the multiple subjugated parts of the world?

Cardinal connotations are always contextual. I teach a diverse population of US southerners, westerners, north-easterners, first- and second-generation immigrants, and international (especially South- and East Asian) students, whose identities and worldviews represent a wide variety not just of souths, but also norths, easts, and wests. From whose perspective does the entire south of the globe look like a single region? The figure of the “south” in the historical vocabulary is dramatically contextual. In the United States, north and south name two historical formations, interrelated both before and after clashing in a Civil War—a conflict about slavery and its role in the political incorporation of a new region, the west. But in my native Argentina, for example, power relations have historically been described as between the capital city and the provinces, regardless of cardinal directions. In Mexico and Chile, where north and south are recognized by common language as ecologically and culturally distinct regions, what matters in fact is their relation to the center—Mexico City and Santiago. In Brazil, the south has been portrayed throughout the twentieth century as “modern,” in contrast to the “traditional” north. The “global south,” thus, requires some explanation. In this article I present, as a Latin-Americanist historian, some insights on the history of the term and highlight its spatial and metaphorical limitations to capture the global and transnational dimensions of Latin America.

To be sure, “Latin America” lumps together many different stories as well, some of them evoked in the European and imperial origins of its very name—the Latin invocation of Rome and the America of the Renaissance cartographers that named it. But far from being just a European construct, Latin America produced its own regionalist projects: a sedimentation of two hundred years of diplomatic, political, and cultural integrationist programs. The historical status of the figure of the “global south,” to the contrary, is less obvious.

Its predecessor, the third world, had its pre-history in the reformist and anticolonial nationalisms of the periphery of the European global order between the world wars, particularly among the intellectuals of national populism in Latin America (Bergel 2015: 258-59). Formulated in the 1950s, it became for scholars and political actors in the 1960s “a concept that combined the labeling and description of a space as a coherent entity with the idea of actively changing that space,” efficiently capturing in one image, as Christoph Kalter shows, the struggle for formal and actual decolonization, the Cold War, and the growing awareness—through varied adaptations of modernization theory—of the inequality of living standards between the “developed” economies and the rest. Born in France as a global adaptation of the revolutionary trope of the Third State (le tiers état), it experienced a crisis in the 1970s and an “almost complete devaluation” after the end of the Soviet bloc in 1989-91 (Kalter 2016: 11, 31, and chapter 2).
Scholars have traced the roots of “global south” much earlier, to Antonio Gramsci’s “southern question” (Dados and Connell 2012: 12). In a series of texts written from 1916 to 1926, and published after World War Two by the Italian Communist Party, Gramsci interrogated the class relations in both the agricultural and rural south and the industrial and urbanized north, the history of the peninsula before and after the unification, the policies of the central state, the war in Africa, the emigration to America, the emergence of fascism, and other crucial issues that reveal not a preoccupation with the south per se, but with the political possibilities of a working-class solution to the problems of Italy as a whole. Particularly his essay “Alcuni temi della questione meridionale” (an incomplete draft written in 1926, not long before he was incarcerated by the Mussolini regime, and originally published in France in 1930, to be clandestinely distributed in Italy) deals with the south not as a discrete subject of study nor as a subaltern space, but as a “question” from which to interrogate historically and politically the totality of Italy, from the southern elites to the northern unions. Being himself a migrant from Sardinia to Torino, the south mattered to Gramsci in terms of the broader whole: he noticed for instance that far from being subaltern actors, the “southern intellectuals” provided in fact more than 3/5 of the national state bureaucracy. In Italy, as in Brazil and the United States, the north-south allegory pointed thus to the political articulations—and therefore also economic, demographic, and cultural articulations—between disparate regions within nations.

The “global south” is for its proponents, to the contrary, a transnational space, encompassing “Africa, Asia, Latin America, and Oceania,” and named after the conjuncture of a geo-political marker of inequality (southern) and a mainstream term in our age of globalization (global). It is also a question, since it “references an entire history of colonialism, neo-imperialism, and differential economic and social change through which large inequalities in living standards, life expectancy, and access to resources are maintained” (Dados and Connell 2012: 13). Hence, whereas Gramsci’s southern question referred to a specific space (Italy) under an explicit program (the working-class revolution) by a definite actor (the Italian Communists), the global south question evokes a much wider, and therefore more abstract set of spaces, programs, and actors. But can the division of labor, the interests of dominant and subaltern classes, and the political alliances be traced, as in Gramsci’s Italy, around a north-south axis on a global scale?

Some attempts to address capitalism as a unified global “question” have attacked the validity of the “north-south” divide. In their influential book Empire, for example, Antonio Negri and Michael Hardt—whose respective works had been in dialogue with Gramsci’s—claim that “Third World, south, and periphery are interchangeable, because their function is to “homogenize real differences to highlight the unifying processes of capitalist development, but also and more important, they name the potential unity of an international opposition, the potential confluence of anti-capitalist countries and forces.” But for them the meaning of those cardinal points is in fact vanishing:


the geographical divisions among nation-states or even between central and peripheral, northern and southern [my emphasis] clusters of nation-states are no longer sufficient to grasp the global divisions and distribution of production, accumulation, and social forms [...]. In geographical regions such as the southern Cone of Latin America or southeast Asia, all levels of production can exist simultaneously and side by side, from the highest levels of technology, productivity and accumulation to the lowest, with a complex social mechanism maintaining their differentiation and interaction (Negri and Hardt 2000: 335-6).
Negri and Hardt display a now usual argument about globalization as a virtually unstoppable force whose planetary articulation of life and work, nature and subjectivity, overcomes all previous geographic configurations. Hence, either celebrated by its neoliberal apologists or lamented by critical thinkers, there is no “south” any longer in the all-encompassing global empire of capital.

But geography still matters, and the state too. Historians and sociologists of past and present globalization have shown states as the main drivers of globalization. And a rapid consideration of the globalized contemporary world’s economic structures—from oil or grains markets to offshore finance and labor migration; governing institutions—from the World Bank and the IMF to the UN and WTO; juridical frameworks—NAFTA, Mercosur; and above all, its military powers, confirms the centrality of state and inter-state regulations. In any case, there has been and there is a “north”: the global influence of the US, Germany, and the European Commission.

However, is their undeniable weight enough to articulate a “global southern question” à la Gramsci?

The fact that entire “southern” societies became comparable and yet remain different to the “north” in many regards, and the truly global influence of China, Russia, India, and in our region Brazil and Mexico—but also, in different times and for different reasons, smaller countries like Cuba, Chile, and Haiti—turn the meaning of the “global south” into anything but obvious. Let us trace its genealogy.

2 A Brief Genealogy of the “Global South”

The recurrence of “global south” in English-language publications began to increase around the mid-1990s and fully expanded in the 2000s:

![Google Ngram](image)

Figure 1: “Global south,” Google Ngram, Feb. 6, 2019

But its meanings were elaborated before. The oldest mention I found is from 1975, in the aftermath of the energy crisis that followed the Arab-Israeli War in 1973. Commenting on the prospect of
decreasing the dependence on oil by developing solar energy in Saudi Arabia, environmental scientist and activist Denis Hayes referred to the need for “global leadership” on “global energy affairs” as key to the future of “global economic activity.” In particular, he pointed to the role of scientific cooperation between the “industrialized north”—where “highly developed nations, all of which are in the temperate zones” have done technical research—and the “poor desert countries,” which have, like the “global south” in general, “greater solar potential” (Hayes 1975: 1261). Activism on “topics of equatorial concern” brought Hayes shortly after that publication to the center of US energy policies, as a director of the Solar Energy Research Institute created by the Jimmy Carter administration. We can see how Hayes replicated an old, Eurocentric view of the world that opposed temperate northern zones of civilization, industry, and science to equatorial zones weak in technical power and knowledge, but rich in natural resources. Written at an institution called “Worldwatch Institute” in Washington, D.C., this text exemplifies the technocratic, global-policy origins of the term “global south.”

A related term, “south-south’ cooperation,” also frequent at that time, was no less technocratic, or problematic. The UN Office for South-South Cooperation (founded in 1974) held a conference in Buenos Aires in September of 1978. As the military junta unleashed state terrorism on the population to exterminate “subversive” citizens that challenged their country’s belonging to the “western and Christian Civilization,” the conference created the “Buenos Aires Plan of Action,” around “global” collaboration, perspectives, and challenges among “developing countries.” A quarter century later the United Nations recognized the Buenos Aires Plan of 1978 as a predecessor to twenty-first-century policies for the “global south.” Their only remorse was that back then governments still “believed in the efficacy of commanded economies” but now believed in “free markets” (UNDP 2004: 3).

In a text written in 1983, historian Anthony Esler referred for the first time to the “global south” as a synonym of the third world. Let us reconstruct his arguments at length, since they carry in them meanings that will seem familiar to us.

According to Esler, the third world encompasses five definitions: racial, religious, political, economic, and historical.

For many westerners, the Third World is still fundamentally the nonwhite world, a region most easily visualized in terms of skin colors running to the earth tones—black, brown, “yellow,” and “red.” For others, it is the non-Christian world, a jumble of unfamiliar faiths ranging from world religions like Buddhism or Islam to the traditional religions of much smaller areas […] For those to whom the Cold War remains the great fact of our age—including many Third-World leaders—the term Third World retains much of its original meaning […] the nonaligned nations […] For many in the west and in the Third World, however, that region is most accurately defined, not in political terms, but in material or economic ones […] the underdeveloped world, less wealthy and less technologically sophisticated than most western countries. In the largest historical context, finally, the Third World is frequently defined in terms of a common experience of conquest, colonization, or economic exploitation by Europeans and their offspring around the globe […] almost all the areas of the earth which have at one time or another, and to one degree or another, been victimized by western imperialism (Esler 1983: 196).
Esler noted multiple exceptions—the presence of “third world” populations in the “developed” countries, and of western elites in the south; that “China is no more part of the global south than Europe is, but is clearly underdeveloped”; or that neither Israel, Japan, nor Australia match any definition of the “global south.” He also pointed out at least three alternative origins of the third world: the international politics of the Cold War and decolonization, the older industrial revolution in the nineteenth century, and the even older European imperialism of the fifteenth century. In any case, Esler applied a trans-historical and Eurocentric definition, at odds with the direction anthropology was taking at the time:

[This] definition would describe the real Third World as the often preliterate, essentially nonurban, fundamentally stateless world of the subsistence agricultural settlement, the nomadic herdsmen, even the surviving hunter-gatherers, wherever these people may be found […] the world of the global village […] where village or nomadic herding and their concomitant cultures have historically been the dominant mode of life. Most of Africa, much of south America, all north the Rio Grande, and all of Australia before the coming of the Europeans would fit this definition. The steppes and tundras of Eurasia, the deserts and deep forests and most of the islands of the world’s oceans […] (Esler 1985: 198).

These are the features of modernization theory’s “traditional world”: preindustrial economies, “social organization centered on family village life and a powerful sense of local community,” “traditional religions” with their “felt closeness to nature and to the forces of nature, and so on. This third world would be the small but self-sufficient world of the subsistence farmer with his hoe and bullock, his ancient skills, and still more ancient gods” (Esler 1985: 198). The “global south” is thus the preindustrial local community, defined by its social homogeneity and its lack of “northern” things such as state, empire, monumental architecture, and literacy, even if their beliefs and ethics are, however, as valuable as the ones of our “sophisticated” cultures and their “theorizing mind.”18 But again, Esler laments that his definition excludes a frustratingly high number of historical and geographical exceptions:

This definition would exclude the cities and early empires that grew up in the cradle lands of Eurasia, Africa, and the Americas […] the river valleys of the Near East and northeastern Africa, of northern India and north China; the islands and peninsulas of southern Europe at a later date; and the centers of early civilization in the highlands of Central and south America in their turn […] the cultural centers of southeast Asia and Japan as they developed, the “Islamic center” of Eurasia and north Africa, medieval and modern Europe, and the modern European-descended societies that have emerged around the world in recent centuries—including our own (Esler 1985: 198).

Here Esler arrives at the view of the preindustrial, nomadic, or community-based “global south” not as countries but as specific regions, peoples, and cultures within countries. In India and Canada, in Kenya and the United States, and in the old Inca and Egyptian empires, some areas belong to the third world, next to others that do not. Far before our contemporary globalization, north and south have always formed a global patchwork. The “global village” was “for several million years the fundamental mode of existence of our human and pre-human ancestors […] The history of the Third World is thus, in a sense, the history of all of us.” Resilient in the face of external forces—enslavement and annihilation by states and empires, commercial farming, industry, government
planning, schools, and mass media—the third world, Esler argues, has always resisted. Not by chance did Moses, Jesus, and Buddha “come out of the pastoral or agricultural backwoods” (Esler 1985: 199–200).

To sum up, in the view of this English-speaking, world-history scholar writing in Richmond, Virginia, the global south is a trans-historical, “civilized,” romantic, timeless series of “Third World villages.”

“Third world” and “global south” overlapped in many texts written during the 1980s. The first expressed a political affirmation, whereas the second suggested the expert assessment of a problem. For example, the Irish handbook of foreign aid, titled World Survival, defined the “global south” roughly as seventy-five percent of the global population living near the Equator, rural, and lacking access to basic subsistence needs (O’Flynn 1984: 9). In 1983, an economic journalist argued that, “as the USA south was the number one economic problem of a nation, the global south is now the number one economic problem of the world” (Pakistan & Gulf Economist 1983: n/d). This text projected the sub-national regional scale—modernization theory that had after all its origins in the Tennessee Valley Authority, the 1933 state-planned infrastructural modernization of the US south—onto the global scale in terms of policy challenges. The “global south” meant thus underdevelopment and suffering. It was a matter of experts and authorities rather than the political organizations of the people or Third State. Mostafa Tolba, director of the UN Environmental Program, facing the signs of an environmental crisis, pushed for supporting renewable resources in the third world in order to keep its population from the cycle of “resource destruction and deprivation,” and lamented that “our [i.e., the experts’, not the local population’s] knowledge of the environment in the global south is sketchy at best” (Tolba 1987: 78). The term also entered the rhetoric of developmentalist nationalism. In a 1982 lecture in New Delhi, Tolba invited India, “one of the leaders of the Non-Aligned Movement, to do all she can to share her experience in tackling environmental problems with her neighbors in the Global South” (Tolba 1987: 34). Slippages occurred between global south and global geopolitics, such as when a US National Security Council and State Department expert in South Asia warned in 1987 that the Soviet Union’s friendship with India gave it “a relationship with one of the leaders of the global South and improved access to the Non-Aligned Movement” (the diplomatic alliance among third world countries created in 1961) (Thornton 1987: 458). The term gained finally a bio-political meaning: an Oxfam officer pointed out in 1990 that most cases of chronic malnourishment, suffered by one in five inhabitants and responsible for millions of deaths annually, “whether of children or adults, occur in Asia, Africa, Latin America, and the Caribbean—the global South, or third world.”

“Third world,” “global south,” and “Non-Aligned Movement” appeared thus, by the end of the Cold War, as inter-connected terms of expertise related to challenges in international relations, environmental policy, and developmental aid. After the end of the Soviet Union, political scientists added a new region to the global south: Eastern Europe, seen as a block, or “global east,” sharing with the “global south” the challenge of neoliberal reforms. (In fact this “east” became a “south” in the views of European governments and development agencies that, pursuing the UN Millennium Development Goals of 2000, emphasized the need for the variety of disconnected souths to engage in cooperation, trade, and partnership.) Only one progressive, anti-neoliberal think tank, an NGO created in 1995 in Chulalongkorn University in Thailand, with branches in Philippines, India, and the Mekong region, adopted it in its name, “Focus on the Global South.” The growing intellectual critique of neoliberalism barely mentioned it in those years.
The cultural disciplines in the US academia that picked up the southern terminology did not use “global south” at first. The journal Nepantla—Views from the South, for example, which was published from 2000 to 2003 at Duke University, proposed, at the “intersection for Latin American, Latino, American, subaltern, postcolonial, and cultural studies” and as an outgrowth of a “Latin American Subaltern Studies Group,” to gather scholars “with common interests in social transformations,” using “southern” as a metaphor. Walter Mignolo explained in the introductory essay that Nepantla “is a Nahuatl word describing the ‘in-between situation’ in which the Aztecs saw themselves in the sixteenth century, as they were placed in between ancient Aztec wisdom and the ongoing Spanish colonization” (Mignolo 2000: 2). Mignolo connected it to the experience of “Chicanos/as in the southwest of the United States today,” as it continues to “inscribe in the history of the modern colonial world the changing borders of colonial expansion, the double side of modernity/coloniality.”

[…] its metaphorical meaning can be extended to nineteenth-century British and French expansion to Asia and Africa, or to the borders reproduced by current global coloniality and the growing hegemony of the north Atlantic. Nepantla […] links the geohistorical with the epistemic with the subjective, knowledge with ethnicity, sexuality, gender, and nationality in power relations […] sealing together modernity and what is inherent to it, namely, coloniality […] Furthermore, and stretching the connotations of the word south a bit, it also brings to the foreground the south as a metaphor “for global suffering under global capitalism” […] it also refers to the south of the Americas, and the south of the United States, as a metaphor for Latinos/as, Hispanics, Latin Americans, and Amerindians in the United States. Last but not least, it creates a space of dialogue with both the socioeconomic conditions and sociological and philosophical reflections in and from the south of Europe […] (Mignolo 2000: 2).

But “global south” was not part of the proposal, and it does not appear either anywhere in the journal.

Neither “global south” nor the Spanish phrase sur global were frequent in the academic and political literature created in the most important engine of social movements and critical thinking of the past decades: the series of World Social Forums that began in 2001 in Porto Alegre, Brazil. The Forum’s keywords were world, pueblos, movements, alter-mondialisme, and other references to global struggles. Only the Bamako Appeal, an anti-neoliberal declaration launched in the WSF of Caracas in 2006, refers centrally to the “south,” but as an appeal to actors in both north and south to resist neoliberal capitalism—i.e., a truly internationalist program.

Our reconstruction of the use of the figure so far suggests that “global south” tended to express what Stuart Rockefeller called a “managerial” view of globalization: like the term “flow,” it suggests a view from above—not from the political perspective of actors on the ground, but from the detached perception of human actions as a systemic, objective, almost natural circulation (of knowledge, resources, or people) (Rockefeller 2011). Like the romantic figure of the “village,” the managerial perspective subordinates human agency to structures only visible by the expert.

The term “global south” was also contemporary to the critique of the “master narratives” in the social sciences and humanities. In the 1990s, while political scientists and economists succeeded in establishing what French critics denounced as “la pensée unique” of Anglo-centric, normative myths of market institutions and civil society, anthropologists and historians to the contrary continued
dismantling the “universal” pretensions of European sciences. In 1995, historian Kerwin Klein warned against the romantic danger in the valorization of local knowledge and local narratives in the (however necessary) critique of the European “universal history.”

The teleological view of History as a singular process of synthesis, as in Hegel’s unfolding of the universal Spirit, he argued, was still lurking in the minds of its critics:

We have replaced Hegel’s peoples with and without history by scientific and savage minds, hot and cold societies, and master and local narratives, but that deep antinomy remains, surfacing unbidden at inopportune moments and wreaking havoc on our attempts to understand the global world in which we live (Klein 1995: 277).

Old essentialist antinomies survived thus not only in the now hegemonic neoliberalism, but also in the othering (however positive) of non-European cultures.

“Global south” acquired a programmatic use in 2007, with the journal of literary and cultural studies The Global South (Indiana University Press). In its introductory essay, the Turkish historian Arif Dirlik confessed to not being sure about the origins of the term (Dirlik 2007). He vaguely traced it to the postwar projects of southern solidarity, like the Asia-Africa international conference in Bandung in 1955, and the World Social Forum (which in fact, as I have shown, barely used the term). His main argument was in fact, curiously, and similarly to Negri and Hardt, about the blurring of the divide between north and south due to transnational globalization: “[p]resently, the boundaries between the two are crisscrossed by networks of various kinds, relocating some parts of the south in the north, and vice versa” (Dirlik 2007: 15). If for Esler, north and south were a binary of civilization vs. village spanning the globe for millennia, often despite actual geographic locations in the north or the south, for Dirlik the wide dissemination of norths and souths was a recent and mainly political phenomenon. As we can see, these are two completely different arguments behind the same figure.

Today, finally, the idea of the global south is used, as literary scholar Anne Garland Mahler wrote recently, “to address spaces and peoples negatively impacted by capitalist globalization” (Mahler 2018: 6). The term is hence particularly ample, and its use very flexible in the fields of literary and cultural studies: “the Global South is not an entity that exists per se but has to be understood as something that is created, imagined, invented, maintained, and recreated by the ever-changing and never fixed status positions of social actors and institutions” (Theres Kloß 2017: 1). In these fields, the term has an ambivalently political and academic sense: the “global south” is a tool for both empowering “the various social actors that consider themselves to be in subaltern(ized) positionalities of global networks of power” and for creating “new modes of knowledge” (Theres Kloß 2017: 1).

The intersection of theoretical and political reflection is where “global south” acquires today its fullest expression, as a legitimate heir of old categories. The Journal of Third World Studies, for instance, published by the association of the same name since 1984, replaced “third world” with “global south” in 2016. Feminist and de-colonial activist and sociologist Janet M. Conway, reflecting on a decade of engagement with the WSF, defined “global north” and “global south” in terms very close to Raúl Prebisch’s 1950 “core” and “peripheral” national economies:

I use the terms global south and global north to denote geographies of global inequality rooted historically in the European conquest of the Americas and Europe’s later colonial
domination on Africa, great parts of Asia, and the Middle East. The global north is generally understood to be centered in the north Atlantic world, but also includes the white settler, “first world” societies of Australia and New Zealand. With global migrations and economic crises rocking the USA and Europe, these terms are increasingly problematic. There is a south in the north, in communities of poor and racialized migrants, Afro-descendants, and indigenous peoples. There is a north in the south in the cosmopolitan elites and growing middle classes in the emerging superpowers of India and Brazil […]. Despite these historic shifts, the distribution of power and wealth in the global economy remains disproportionately in the countries of the “core” in the global north (Conway 2013: 164, fn 3).

The term appears in Conway’s book just as a rapid reference, but it also serves her to explain her own situation as researcher/activist:

My writing about the World Social Forum, a phenomenon of the global south, in English with access to academic audiences affords me an authority conferred by the geopolitics of knowledge. As a white professional from the global north, I moved freely across international borders…My being a woman was a more contradictory experience: it facilitated access to some conversations while marginalizing or outright excluding me from others (Conway 2013: 27)

Through the figure of the global south, Conway explains her position in the international geopolitics of power—a reflection on the material and institutional conditions of scholarly production not very frequent among academics.

The “global south” has thus accumulated multiple meanings. It is close to the postwar critique of global economic inequality by the Economic Commission for Latin America, with its division of the world into “core” and “peripheral” economies; it is also close to concepts like “developing countries” (as elaborated by the United Nations and other agencies of international cooperation); to inequality and “subalternity” (by the decolonial tradition); to the “third world”; and to the romanticized “other” of the north and the west. In this polysemy lays its power, but also its fundamental vagueness. This explains, as I will show now, why it fails to capture Latin America’s historical role in the process of globalization.

3 Latin America and the “Global South”

From the perspective of Latin American Studies, the term “global south” raises four main questions.

The first is about its actual utility as a framework for regional and transnational research. For both intellectual and practical reasons, scholarship on Latin America, as everywhere else, tends to focus on the local and national levels. But there is also a long history of intellectual reflection on the region as a whole, and on its relations with the rest of the world. Especially since the 1960s, when a critical mass of studies were organized around the Latin American Council on Social Sciences (CLACSO, founded in 1967), the US-based North American Congress on Latin America (NACLA, founded in 1966), and the Latin American Studies Association (LASA, in 1968), fostering regional approaches and comparisons. Historians in particular studied the region in its relationship with the wider forces...
and actors that shaped global capitalism. In the past two decades, research beyond domestic boundaries adopted terms like “globalization” and “transnationalism,” stimulated by intellectual responses to neoliberal globalization, digital access to resources, and transnational collaboration funded by public research agencies throughout the region. What is, in this context, the unique value of “global south”? To take one telling example: historians are reconstructing the history of the anarchist movement, one of the most conscious and global enemies of capitalism, imperialism, and inequality, animated by people and ideas from multiple languages and ethnic origins, in such heterogeneous social formations as Italy, Spain, the Russian empire, Germany, Bolivia, Argentina, the US, and Mexico. Where was the “south” of this movement? What would “global south” add to the study of the anarchists’ own understanding of capitalism, state violence, and class struggle? The same question is posed by the global history of gender oppression and imperial imposition over native cultures: what does “global south” have to add to the study of these forms of inequality, compared to “patriarchy” and “colonialism”?

The second question is about the heterogeneity behind both the global south and the other pole of the figure, the global north. The latter hides a striking variety of historical experiences: Scandinavian welfare states, European fascisms, inward-colonizing democracies like Australia, and empires so divergent in their ideological, racial, sociological, and institutional features like the Japanese, the US, or the British. By the same token, the “south,” and Latin America in particular, also contains dramatically diverse experiences. It has combined “developed” and “under-developed” areas and features since the sixteenth century, when Potosí was more central to the global economy than most European cities. Caribbeanist historians are questioning the ethnocentric notion of “European science” by studying its encounters with African and indigenous epistemologies around colonial healing knowledge. More recently, Uruguay expanded abortion rights, as several US states began to roll them back. The binary “global south-global north” risks, then, to reify rather than illuminate in their mutual intertwining the multiple experiences of modernity.

The experience of colonial subjection leads to the third question. “Colonial spaces” would include, in a non-exhaustive enumeration, US territories within and beyond the “formal” USA, the overlapping sovereignties of the British, the UK, and the Commonwealth from northern Ireland to Canada, New Zealand, and Hong Kong; parts of China, Africa, the Middle East, and Latin America. The notion of “coloniality” would bring in also Native, Latino, Muslim, and African American populations in urban centers like New York or Berlin, as well as the Malian, Salvadoran, and Syrian migrants, refugees, and asylum seekers detained in camps in the US or risking death in the Mediterranean on their way to Europe. What exactly does “global south” add that is not already contained in the concepts “empire,” “coloniality,” and “subalternity?” Is “south” an appropriate label for Latin America’s anti-imperial imagination, elaborated—from Marxism to internationalism and from indigenism to feminism—through global dialogues, not just within the south, but with Europe, the Communist world, regional networks, the Atlantic, and the east? Like the old climatological and Hegelian philosophies of history, “global south” confines the “other” of Europe to a stereotypical geography.

The final question is about the exclusivity of the historical traits of the “global south.” A crucial fact often dismissed is that the experience of what Bigelow and Klubock call “appropriation, colonization, and extraction of knowledges, resources, and ways of life” happened earlier, and also contemporarily, in the “north” as well. Capitalist relations and state violence were “imposed” on the peasants of Germany and France as the Spanish monarchy and the modern national state did so in
Chile or Guatemala. Land dispossession, state violence, and the institutional engineering of the symbolic and material resources that made global capitalism possible in early-modern times began in Europe. If we want to analyze, say, the Eurasian peasantry from Manchuria to France, the proletariat that emerged since the eighteenth century from England to Russia, the subaltern indigenous populations from Canada to Patagonia, and the enslaved Africans sold as laborers to the four corners of the world, we already have words like *peasantry, indigenous, proletariat, and slavery*, emerging from global, transnational, and cross-regional processes. It is not clear how the figure “global south” would further illuminate them. Was the awe generated by cinema, that invention of “the west,” among its first spectators in Havana radically different from the awe experienced in Paris or Shanghai? In the late twentieth century, “de-industrialization” was experienced as citizen dispossession in Buenos Aires no less than in Lyon or Cincinnati. Many supposedly “southern” phenomena—inequality, authoritarianism, even extreme poverty—happen also in the north. Where is the north, and where the south, for example, in the current global wave of right-wing politics? Journalists and scholars rely on South American comparisons to describe Donald Trump’s “populism,” but also describe leaders like the Brazilian Jair Bolsonaro as iterations of Trump, and point to similarities and connections among them and extreme-right movements in Hungary, Italy, and the Philippines. Similarly, none of the forms of “leftist and anti-imperialist” scholarship identified with “subaltern movements” that Bigelow and Klubock signal among the influences of Latin Americanism, such as liberation theology, dependency theory, and more recently, decolonial critical theory, can be understood without their “northern” roots. To wit: liberation theology emerged in dialogue with European Catholicism and experiences like those of the French worker-priests of the 1940s; dependency theory was concocted by intellectuals who pursued development and worked with bibliographies, methods, and institutions of the “north” and of “western” social science; the decolonial paradigm emerged and grew fundamentally within US universities, in the work of exiled “southerners” who write in English. The very project of the third world was infused with “northern” ideals like socialism and industrialization. The northern roots of these ideas and theories reveal epistemic and political dynamics that contradict a purported south-north divide.

The figure of the “global south” is more productive when it challenges rigid geographic habits, and Latin Americanist scholarship is particularly good at this. When the congress of the anthropologists of the Mercosur (congregating scholars working in Brazil, Uruguay, Paraguay, and Argentina) promotes “anthropologies of/from the south,” it animates topics and approaches that are critical of current economic and scientific imperialism. Historian Karin Rosemblatt does the same in studying the interaction of Mexican and US state officials, intellectuals, and indigenous groups behind the historical making of both Mexican and US anthropology.

The historiography of the international order is challenging the established binary view. Historian Christy Thornton notices a traditional “decolonization divide”: scholars typically use a nineteenth- and twentieth-century European imperial history focus, and hence “actors and ideas travel through Bandung and Belgrade, but only rarely Bogotá or Buenos Aires” (Thornton 2018: 293-94). To the contrary, Thornton’s research on the Mexican intellectual and diplomatic role in the international history of attempts of global governance puts Latin America in the center. She does situate Latin America in the “global south”: sharing, under a different periodization, with “Africa, Asia, and the Middle East […] the experiences of colonial rule, economic subordination, and the struggle for decolonization and self-determination.” However, by seeking to understand these actors “together, in relation to one another and to the Global north,” she finds in the Mexican archives a “language of ‘interdependence’ in the international economy,” “the notion that states had both rights and
duties in the world economy,” and specifically, in “Latin American internationalism since well before the existence of the United Nations” [...] “the idea of ‘states’ rights against private capital.” Latin American actors created, thus, like other internationalist alliances (such as the Non-Aligned, the NIEO, and the third world), their own languages, vocabularies, and concepts as part of a universalist sense of democracy and sovereignty. Interestingly, the main actors in this history were not Esler’s mythical third world villages, but the progressive fractions of the elites of two of the most successful state-building projects and wealthiest economic spaces in Latin America (Mexico and Argentina), which generated alliances among “what were variously called the weaker, poorer, or debtor countries of the world.” (Thornton 2018: 293-94).

The lack of a precise meaning in the figure of the “global south” sometimes fosters, but more often trumps, the goal of connecting Latin America with larger global geographies, and this is not a purely academic problem. The “pink tide” in Latin America—the Workers Party in Brazil, the Kirchner administrations in Argentina, the socialist movement led by Evo Morales in Bolivia, the Bolivarian project in Venezuela, and the Correa administration in Ecuador—mixed neocolonial patterns of mineral and agricultural extractive and export-oriented development, on one hand, with progressive sovereign policies, deepening of collective and individual rights, and reduction of poverty, on the other. Support of employment, domestic demand, and higher minimum wages came together with state-led capitalist development and an active multilateralism that challenged global hierarchies (through BRICS, Celac, and Unasur). Most of these projects were more recently rolled back by internal and foreign enemies—in Venezuela and Nicaragua, in the midst of virtual civil war, authoritarianism, and US pressure; in Brazil and Argentina, through the reaction of businesses, media corporations, international finance, evangelicals, the military, and “neoliberal” middle classes opposed to the redistribution of wealth, the autonomy vis-à-vis the “north,” and even the subalternist re-writing of national narratives. These governments certainly lost the momentum of the anti-neoliberal social movements that created the conditions for their emergence, and were viciously attacked by mainstream voices as “populists.” But they were also critically considered by “global south” intellectuals for not being “decolonial” enough. The critique of the “northern” modernist dogma ended up in some cases converging with a right-wing reaction on a regional scale.

4 Conclusion

Perhaps the main limitation of the figure of the “global south” is its excessively flexible and abstract nature, which leads sometimes to essentializations. In 1999, Gayatri Spivak, for example, argued that “the global south” could produce an “alternative geography” to the European “sovereign subject” and its “positivist empiricism,” which sustained the history of “capitalist colonialism” and “neocolonialism,” incapable of really understanding “the national subject of the global south.” Used in this way, the “global south” becomes an abstract, planetary, structural subjectivity opposed to Europe and its hegemonic forms of knowledge, hence reinforcing the ethnocentric reason that was the target of the critique. It functions as a form of “othering,” by lumping together, like the old modernization theory, all the non-western peoples despite their myriad forms of existence and their unique cultural and political experiences of converging with the European modernities. The geography implicit in “the global south” may thus reinforce the historicism that from Kant and Hegel through Marx had subordinated the world to “the west.” It also fatally dissolves any clear geographic reference, as in Matthew Sparke’s definition: “the Global South is everywhere, but it is
also always somewhere, and that somewhere, located at the intersection of entangled political geographies of dispossession and repossession” (or “the ‘shadow of a geographical pattern’ in deconstruction”), requires an “open-ended graphing of the geo” (Sparke 2007: 117).55

Probably there is not a single figure capable of capturing the history of the multiple states, classes, groups, networks, and social movements of variable sizes and might that, across the world, shaped globalization by both challenging and setting boundaries for autonomy, equality, and solidarity against imperial capitalism and, more recently, neoliberal globalization. Should we not apply instead transnational approaches to understand specific and contextual questions of diverse scale, in the past and present of global capitalism?

As I attempted to show in this article, Latin America offers such a “question.” Latin American historians continue to study forms of local and global politics that have set in the past, and may set in the future, clear limits to capitalism by involving themselves at the same time in the process of globalization. By the time the very figure of the “global south” emerged, Latin American intellectuals had been for almost a century formulating the region’s big questions: what is the place of Latin America in the world? What paths of economic development could it pursue? How can its states seek, through progressive class alliances, a fair global order?56 These interrogations are inherent to the experience of global capitalism and modernity everywhere: the goal to achieve and define democracy, sovereignty, and development. Indigenista and feminist critiques have challenged and expanded those interrogations by pointing with increasing force to their colonial and patriarchal dimensions.57 But meanwhile, the lack of a forthright critique of the genealogy of “global south” allowed managerial, romantic, and ethnocentric meanings to travel within it. Despite its critical power, and beyond the specifically philosophical realm of reflection, the figure ended up suggesting in Latin American studies what Friedrich Nietzsche, referring critically to how history looks for the “super-historical people” in the epigraph to this article, called a “motionless picture of immutable values and eternally similar meaning.” The current crisis of globalization under Brexit and Trump was produced from the very cities, London and Washington D.C., that commanded neoliberal globalization since the Thatcherian and Reaganite 1980s.58 The confusion this situation brings to global and particularly Latin American debates regarding the future invites us to engage in a less totemic and more contextual approach to the cardinal points of the geography of globalization.

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The recent book by agrarian anthropologist James Scott proposes a twist to the binary opposition of a state-local community arguing that for millennia human groups entered and exited the boundaries...


33 Sinah Theres Kloß, “The Global South as Subversive Practice: Challenges and Potentials of a Heuristic Concept,” The Global South 11, no. 2 (2017): 1–17. The embrace of the term by these disciplines is visible in the profiles of the editorial boards of both the journal The Global South and the University of Virginia’s digital scholarship project Global South Studies.

34 It was founded by a group of scholars in the US South, especially Georgia, but with a truly global network of collaborators, as an “international structure for the humane and scientific study of peoples, problems, and issues in the world’s developing countries, with the ultimate goal of improving quality of life.” Gary Kline, “Foreword,” Journal of Third World Studies; Americus 32, no. 2, (Fall 2015): 7.


36 See for example, Bigelow and Klubock (2018: 575).

37 “East Asia commands only 1.9 per cent of all history faculty appointments in the UK. In the US, the figure is almost 9 per cent […]. In all the German-speaking universities, there are only five professors of African history. In Japan, to study non-Japanese and non-‘Oriental’ pasts means dispatch from
history departments altogether, to teach about the Other in other units on the margins of the master-discipline.” Jeremy Adelman, “Is Global History Still Possible, or Has It Had Its Moment?” Aeon, March 2, 2017.


See for instance the variety of approaches in Matthew Gutmann and Jeffrey Lesser, eds. Global Latin America: Into the Twenty-First Century (Oakland: University of California Press, 2016).


