



## The Elusive Global South

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## Introduction

The term “the Global South” has become widely used in media and policy reports, and even academic papers in recent years, but the term is rarely defined, either on its own or in relation to something else. Instead, headlines talk of China or India representing the Global South in international forums. Despite vague and sometimes contradictory definitions, it is assumed that this group has a common agenda and could have a single leader representing a shared vision. This brief focuses on the term Global South as a value driven grouping and the limitations of defining global complexity and diversity in this single entity.

## What’s in a name?

*We were once known around the world as poor countries, as third-world countries, as underdeveloped countries, as developing countries. No. Now we are the economy of the Global South.*

Brazil’s president Luis Inacio Lula da Silva, at the 37th African Union Summit in February, 2024.<sup>1</sup>

The term Global South was apparently coined by Carl Ogelsby in 1969 while discussing the Vietnam War in the journal *Commonweal*.<sup>2</sup> At the time, conventional analysis divided the

world into three: the “First World” was the industrialised “West” and its allies, the “Second World” referred to the Soviet Union and Eastern Europe and the “Third World” constituted of other developing countries. After the end of the Cold War, these groupings became increasingly meaningless.<sup>3</sup> In economic terms, countries have in the postwar era been divided into “industrialised” and “developing” or “less developed” countries, the latter terms designating countries with low per capita GDP, large agricultural sectors and small industrial sectors. In the 1980s, the term “emerging economies” became common to separate a set of fast-growing and rapidly industrialising developing countries from others. In the 1990s, the term “transition economy” was used for the countries in the former Eastern bloc that were shifting from planned into more market-oriented economies. More recently, the concept of “emerging and developing economies” (EMDEs) has included the fast-growing, fast industrialising economies and the slower growing less industrialised countries.<sup>4</sup>

The term Global South has now gained traction and become a common concept in both policy analysis and academia. Haug et al. found that it was used in just one publication in 1994 but by 2000 had been used in 1600 publications on world politics.<sup>5</sup> They also noted from a sample of studies that the term was used with no attempt to define

<sup>1</sup> <https://agenciabrasil.ebc.com.br/en/politica/noticia/2024-02/lula-meets-african-presidents-speaks-strong-global-south>

<sup>2</sup> Ogelsby, C, ‘After Vietnam What?’, *Commonweal*, 1969, Vol XC

<sup>3</sup> Patrick, S and A Huggins, ‘The term “Global South” is surging. It should be retired’,

Commentary, Carnegie Endowment for International Peace, 15 August 2023

<sup>4</sup> e.g. Abiad, A et al, ‘The rising resilience of emerging and developing economies’, IMF working paper 2012:300.

<sup>5</sup> Haug et al., The Global South in the study of World Politics, *Third World Quarterly*, 2021, Vol 42., No 9.



it or even make a case for what it added to the discussion. Instead, the selected papers assumed that readers would know what the Global South was. Unlike previous denominations, Global South appears to assume a shared set of values and priorities.

The assumption of common development priorities and geopolitical agendas presents challenges from an economic, political and even geographical viewpoint. Countries that often are considered to belong to and even represent the Global South, including China and India, and sometimes Russia, are fully in the Northern Hemisphere. In the popular debate, the concept appears to represent a group of countries with, if not homogeneous economies and societies, at least homogeneous interests vis-à-vis an assumed hegemony which, to obscure things further, has long been referred to as “the West”, although the Global North is now surging as a new label. These countries, whose values and priorities are assumed currently to dominate global order, in turn appears to refer to industrialised countries in North America and Europe, but possibly also to include Australia, New Zealand and Japan.

## **An economically and politically diverse group**

*From a geographical perspective, the global south has always existed, but it has received the voice of its own for the first time.*

India’s Prime Minister Shri Narendra Modi, at the Voice of the Global South Summit, November, 2023<sup>6</sup>

In 1964 the Group of 77, which represented 75 developing and newly independent nations, jointly called for trade and development policies that would support their growth. The G77 has since grown to represent 134 countries.<sup>7</sup> In G77 statements, the terms South and Global South are often used in discussions about so-called South-South cooperation and to present a unified voice on trade and development issues.

A closer look at the countries that make up the G77 sheds light on the difficulties with the concept of the Global South from an economic viewpoint. The group comprises low- and middle-income countries; that is, countries with a per capita income of less than US\$ 13 845.<sup>8</sup> This vast group of countries includes Mali, Brazil and Papua New Guinea, for example, countries with very different levels of human capital and natural resource endowment, as well as economic prospects. If upper-middle income countries with per capita

<sup>6</sup> <https://www.voanews.com/a/modi-urges-global-south-leaders-to-unite-against-challenges-from-israel-hamas-war/7359279.html>

<sup>7</sup> [www.g77.org/doc/members.html](http://www.g77.org/doc/members.html)

<sup>8</sup> As per World Bank definitions, <https://www.worldbank.org/en/country/mic/overview>.



incomes between US\$ 4 466 and US\$ 13 845 are excluded, this excludes Brazil, China and Russia, three of the five original BRICS countries, and the 134 countries that make up the G77 would be reduced to 78. (The G77 also includes high-income countries such as Singapore and the UAE.) The 78 countries included in the United Nations South-South cooperation database are equally diverse in terms of GDP per capita. Countries at the same income level have vastly different economic structures and face vastly different challenges. The upper-middle income countries include resource rich exporters such as Oman and resource poor countries such as Nauru. In sum, categorising countries according to per capita income levels tells us something about the level of economic development but says little about different development paths or why such diverse economies should be treated as one group.

Politically, the Global South is an equally diverse group that encompasses democracies like India, one-party states like Vietnam and an absolute monarchy such as Brunei. Data from Freedom House, which measures civil liberties and political rights, finds major differences among the countries in the income categories that capture the Global South, ranging from Brazil and South Africa which it categorises as free, and Angola

and China as not free.<sup>9</sup> Another way to assess political positions is to examine voting patterns in the United Nations. Analysis of voting patterns focused on identifying support for the United States and China finds that economic links, through bilateral trade and foreign aid, largely determine such voting patterns.<sup>10</sup> In the March 2023 vote on a non-binding resolution urging Russia to withdraw its forces from Ukraine 141 countries supported the resolution; seven opposed it and 13 were absent. The 32 countries that abstained included large economies such as China, India and South Africa, as well as very poor countries. In explaining the abstentions, researchers found little support for the idea that trade with China was a factor but significant support for the idea that trade with Russia was.<sup>11</sup> However, the most significant factor in the abstentions was non-economic, such as defence cooperation with Russia or being part of China's Belt and Road Initiative. The authors argue that abstentions were largely driven by the notion of "belonging to the Global South". That gives an indication of a perceived common political agenda among some countries.

## A Common Agenda?

Clearly, the Global South cannot easily be defined by geography, economic data or political position. To what extent is it then

<sup>9</sup> *Freedom in the World 2024*, Freedom House.

<sup>10</sup> See for example Dreher et al "Apples and dragon fruits: the determinants of aid and other forms of state financing from China to Africa", *International Studies Quarterly*, 62 (1): 182-194 and Woo and Chung, "Aid for vote? United

Nations General Assembly Voting and American Aid Allocation", *Political Studies*, 66 (4):1002-1016.

<sup>11</sup> Amighini and Herrero, "What really Influences UN voting on Ukraine", 3 May 2023, Bruegel Analysis



possible to talk of a common agenda? There are common ideas on trade policy and strengthening the voice of developing countries that can be traced from the G77 to today. The first statement by the G77 back in 1964, which was made in connection with an UNCTAD meeting, emphasised the need for trade policies that support industrialisation in developing countries. It also called for decisions in international organisations to be made by a two-thirds majority in order to give developing countries sufficient influence. More recent statements have addressed a broad range of topics.<sup>12</sup> This may well be a result of the divergence of member countries. Singapore, for example, is a resource poor trade dependent country that tends to favour free trade agreements that many other countries oppose.

The non-aligned movement – a bloc of countries not formally aligned with or against any superpower – has been another strand in the debate. Countries that were present at the Bandung Conference in 1955 often refer to their positions as non-aligned. Phillips points out that while the 29 states that met in Indonesia condemned colonialism and imperialism, the outcome was not a revolt.<sup>13</sup> Rather, it led to support for an international order with new nation states and the development of universal human rights. The conference also called for more South-South collaboration and paved the way for calls for a new international economic order with

trade and development policies that actively support economic development.

Reading between the lines, countries in the Global South are assumed to have a common agenda, and to be able to unite behind that agenda despite their other differences. It is true that the balance of power and influence in international organisations is often understood as tilted in favour of the “old” West. These countries provide most of the funding and therefore have disproportionate influence in many UN organisations. However, wanting reform of these institutions is not the same as having a unified idea of how to reform their role or how they are governed. Developing countries also want better terms of trade and in particular better access to markets in North America, the European Union and Japan.

## Is there a leader of the Global South?

*A major problem for the Global South is they are expected to adhere to norms set by others. By expressing the views of the Global South, the Centre could play an important role in shaping the norm.<sup>14</sup>*

Sanjeev Sanyal, a member of the Economic Advisory Council to Modi about the Dakshin centre for the Global South.<sup>15</sup>

<sup>12</sup> E.g

<https://www.g77.org/doc/Declaration2023.htm>

<sup>13</sup> Phillips, A, “Beyond Bandung: the 1955 Asian-African Conference and its legacies for international order”, *Australian Journal of International Affairs*, 2016, vol 70, No 4.

<sup>14</sup> Representative voices from the Global South at the inauguration of the Centre, <https://www.ris.org.in/en>

<sup>15</sup> Representative voices from the Global South at the inauguration of the Centre, <https://www.ris.org.in/en>



A third aspect of the concept of the Global South is the extent to which there is a leader or even should be a leader of such a diverse group of countries. Both India and China like to portray themselves as representing the Global South in forums where fewer countries are represented, such as the Group of 20, and both countries were present in Bandung in 1955. However, both countries are ambiguous about their position as growing economies seeking greater political clout internationally which occasionally fall back on their positions as rapidly, but still, developing countries. A study of bilateral influence (measuring both trade and diplomatic relations, and dependence of either party on the other) shows that whereas the US has held the most influence over G77 countries in the past, it has now lost out to China, with India's bilateral influence increasing rapidly as well.<sup>16</sup>

India's foreign policy places a strong emphasis on its position as the world's largest democracy, a rapidly growing economy and member of the G20. When India assumed the presidency of the G20, one of its priorities was to raise the profile of the Global South. A first summit on the "Voice of the Global South" was held in January 2023, followed-up by a second, virtual gathering, in November that year.<sup>17</sup> Representatives from a diverse group of 125 countries attended, many of which are members of the G77. In his opening address to "Leaders of the Global South", Prime

Minister Modi emphasised that these countries represented three-quarters of humanity and should have a stronger voice in shaping a new model of global governance. Both summits had ministerial sessions dedicated to specific sectors led by ministers in areas such as energy, health and commerce. At the second summit, Modi inaugurated the Development and Knowledge Sharing Initiative (Dakshin) Global South Centre of Excellence, to be hosted at a research institute in New Delhi. Statements like this suggest that there was a common view among the countries that participated, but as yet nothing concrete has been communicated about these norms. It is clear from the summary notes and the press briefing that there was agreement on the need to reform the multilateral system, global financial institutions and the global financial system, but there were no specific proposals.<sup>18</sup> The summits and the establishment of the Centre suggest that India sees it itself as a leader or at least a leading voice of the Global South. The addition of the African Union as a G20 member was highlighted as a significant step in raising the voice of the Global South in the G20 and as a significant achievement by India.

Thakur notes that India presents itself as a rising power with growing economic clout that should give the country more political clout and ideally also a seat on the UN Security Council.<sup>19</sup> At the same time, India's

<sup>16</sup> The Economist, April 13 2023 edition, "Who's the big boss of the global south? "

<sup>17</sup> <https://www.mea.gov.in/voice-of-global-summit.htm>

<sup>18</sup> [https://www.mea.gov.in/media-briefings.htm?dtl/37271/Transcript\\_of\\_Special\\_](https://www.mea.gov.in/media-briefings.htm?dtl/37271/Transcript_of_Special_)

[Briefing\\_by\\_Foreign\\_Secretary\\_on\\_the\\_2nd\\_Voice\\_of\\_Global\\_South\\_Summit\\_November\\_17\\_2023](#)

<sup>19</sup> Thakur, R., 'How representative are BRICs?', *Third World Quarterly*, 2014, Vol 35, No 10.



identity is rooted in being a developing country with the challenge of translating its growing economy into more jobs for a young population and providing adequate education and other services to support its growth.

China also likes to portray itself as a leader of the Global South but – tellingly – did not participate in the Global South summits hosted by India. Nor did President Xi Jinping attend the final meeting of India’s presidency of the G20. Instead, China tends to refer to its own development path and how that can serve as a model for others to follow. Indeed, only recently has China begun to refer itself as part, not only partner, of the Global South. Since its “opening up” to the world economy in 1978, China has become the second largest economy in the world, a major trading nation and a de facto factory for the world. It has also been able to dramatically reduce poverty levels. The Chinese development trajectory, with its strong focus on economic infrastructure, is presented as key to industrialising and raising income levels. China has also taken several initiatives that promote its vision, such as the Belt and Road Initiative, the Global Development Initiative, the Global Security Initiative and the Global Civilization Initiative. Each of these presents an alternative to traditional western development assistance and traditional development models, as well as different ways to collaborate in international affairs. Furthermore, as founder of both the Asian Infrastructure Development Bank and the New Development Bank, China is using its financial clout to support development

polices built on its development model, mostly focused on financing infrastructure. China also holds the position of the only notionally developing permanent member of the UN Security Council. A recent study of African international relations entitled *Is Africa Turning Against the West* presents a nuanced view, noting concerns with western attitudes and calls for more dialogue on issues such as the structure of the United Nations.<sup>20</sup> A chapter on relations with and views on China provides a mixed view. An opinion survey showed that an equal number of people have a positive view of the United States as of China, and there is some resentment towards Chinese activities in Africa.

While China and India both portray themselves as leaders of the Global South, their fellow BRICS founding member Russia does not. Russia is chairing the BRICS in 2024 under the slogan “Strengthening Multilateralism for Just Global Development and Security”. This echoes the calls for changes to the multilateral system at the Global South summit in November 2023. Some 200 events are planned but what the outcomes will be remains to be seen. The BRICS has been touted by some as the organisation that could best pursue issues concerning the Global South. Even though they tend to argue for a multi-polar world, however, the five original BRICS are not necessarily in agreement on how they would change the international order and rules-based international system.<sup>21</sup> Extending the BRICS to five new members – the United Arab Emirates, Saudi Arabia, Iran, Ethiopia and

<sup>20</sup> Carbone, G. and L. Rabazzi, (eds) *Is Africa turning against the West*, ISPI report, 2023.

<sup>21</sup> .e.g. *ibid*, <https://carnegieendowment.org/2023/12/21/south-africa-in-emerging-world-order-pub-91310>





Egypt – has made it an even more diverse group both economically and politically. South Africa has insisted that the expanded BRICS is not anti-West.<sup>22</sup> It is not clear how either the original five or the expanded ten members could act as representative of the Global South, let alone of middle-income countries.

Since his return to the presidency of Brazil, President Lula has become more vocal than his predecessor about Brazil's role in the Global South. Brazil holds the presidency of the G20 in 2024 and has chosen the slogan "Building a Just World and a Sustainable Planet". Its priorities are tackling inequality, climate change and the governance of financial institutions. According to some analysts, food security will be a key priority as it addresses both domestic and international concerns regarding agriculture, food security and climate change.<sup>23</sup> Lula has called for changes to the global finance system as well as an end to US dollar dominance in trade, and supported the use of the renminbi.<sup>24</sup> In February 2024, Lula visited several African countries and addressed the AU Heads of State Meeting, declaring Africa to be central to the Global South.<sup>25</sup> This visit followed two visits in 2023 – to the Brazil-Angola forum and the Brazil-Africa Forum. The latter devoted a special session to discussing how Brazil could trade and invest more in Africa.<sup>26</sup>

<sup>22</sup> S'thembile Cele, "BRICS Expansion Isn't Aimed at Countering the West, South African Official Says," Bloomberg, August 7, 2023, <https://www.bloomberg.com/news/articles/2023-08-07/brics-expansion-isn-t-aimed-at-countering-the-west-south-african-official-says?sref=QmOxnLFz>

<sup>23</sup> Blogpost from Atlantic Council, "Brazil aims to advance its bid for leadership of the Global

Brazil is thus building closer ties with African states while also emphasising food security, which is central to many African countries.

## Concluding remarks

The Global South has rapidly gained traction as shorthand for a large group of poor and rich countries that are assumed to be vaguely anti-West in their values and seeking a new global power dynamic. Its increasing popularity among larger, globally influential countries such as the BRICS, suggests it is probably here to stay for the foreseeable future. However, this brief has attempted to highlight the many challenges in applying the concept. The differences among the countries often included in this group are substantial, reflecting diverse economic and geopolitical challenges and agendas. There are several contenders for leadership of the Global South, each with distinct priorities, and no clear leader has emerged. While arguments are made against existing global trade and financial systems, there does not appear to be a consensus around an alternative system. The notion of two opposing groups in the West and the South, each united behind a common set of values that are in fundamental opposition to one another, oversimplifies global geopolitical diversity and does not make for an informed debate on understanding the world.

South through food security", 14 February 2024, J Lipsky and M Bhusari.

<sup>24</sup> Financial Times 13 April 2023

<sup>25</sup> <https://www.trtworld.com/africa/african-continent-key-to-global-souths-future-brazilian-leader-17027492>

<sup>26</sup> <https://www.afdb.org/en/news-and-events/press-releases/brazil-africa-forum-2023-african-development-bank-group-calls-increased-brazilian-investment-infrastructure-and-logistics-65523>



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