

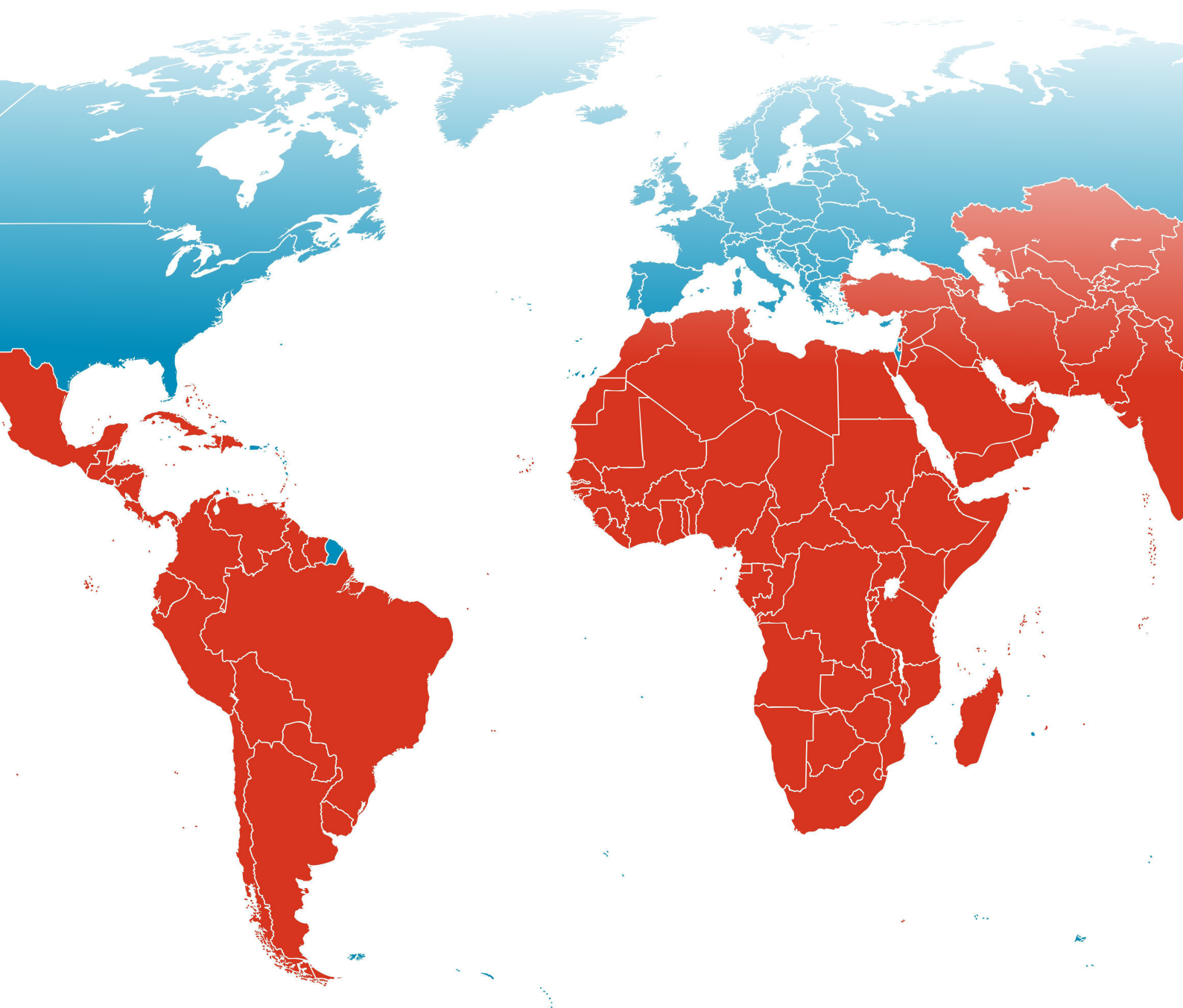
The Myth of the 'Global South'



A Flawed Foreign Policy Construct

Marcus Solarz Hendriks, Jay Mens and Harry Halem

Foreword by Rt Hon James Cleverly MP and
Admiral Lord West of Spithead GCB DSC PC



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Endorsements

“Policy Exchange’s report offers a comprehensive critique of the current fascination with the ‘Global South’ among policy makers and academics around the world. Informed by a historical sensibility to the evolution of post-colonial political ideas and animated by an incisive appreciation of geopolitics, the report deconstructs “Global Southism” and proposes pragmatic alternatives to pursue British and Western interests in the non-Western world.”

Professor C. Raja Mohan, former member of India’s National Security Advisory Board and former Director of the Institute of South Asian Studies, National University of Singapore.

Acronyms

- AIIB – Asian Infrastructure and Investment Bank
- BRI – Belt and Road Initiative
- ICF – The UK International Climate Fund
- MDB – Multilateral Development Banks
- IDA – The World Bank International Development Association
- NDPB – Non-departmental Public Body

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Foreword

Rt Hon James Cleverly MP

Sloppy language is often an indicator of sloppy thinking.

It's why I banned the FCDO from using the phrase "deeply concerned." My argument was that as a founding member of NATO, member of the G20, G7, Permanent Member of the UN Security Council, etc., the UK shouldn't express how we feel about world events but rather what we are doing about them.

I must confess I wasn't always successful, particularly when drafting texts with international partners who were particularly wedded to that form of words.

The same is true of "Global South".

While the term "Global South" may have slipped from my lips in the past, I've added it to my banned list. Supported by painstaking research and an impressive grasp of contemporary global dynamics, Policy Exchange's report rightly argues that the phrase is not just meaningless, but also potentially damaging to the interests of the UK and our allies.

As Foreign Secretary I told the FCDO to focus on the countries that would be the power players of the future. To listen carefully to their news and aspirations and to make sure the UK was a partner of choice for them over future decades. Countries rather than continents, regions, or hemispheres.

The idea of a "Global South" hive mind is nonsense. Why would a fast-growing African nation feel better disposed to the UK because of a foreign policy decision aimed at a country in Latin America or a Pacific island nation?

Just as the term BAME is simply a less explicit way of saying "not white", Global South is more a definition of exclusion than inclusion. It says not Euro-Atlantic, not EU, not P5, and it hides a disdainful attitude behind the camouflage of warm words.

The UK should be courageous enough not to rely just on its Euro-Atlantic comfort blanket. The answer is not to cluster half the globe, 80%+ of the World's population, and the vast bulk of global economic growth into one meaninglessly named group.

This report has interesting ideas that seek to address the problems. Anyone who seeks to better understand how the UK should chart its course through a more dangerous world should read it carefully.

A final thought. Individual approaches to countries work best. It

would be far better if the new government didn't fall into the trap set by those who wish to drive a wedge between us by using an inappropriate, inaccurate label.

Rt Hon James Cleverly MP, Shadow Home Secretary and former Secretary of State for Foreign, Commonwealth and Development Affairs, and Secretary of State for the Home Department

Admiral Lord West of Spithead GCB DSC PC

This week, as Commonwealth leaders convene in Samoa, and Russia hosts the BRICS summit, the shifting tectonic plates of an increasingly complex geopolitical landscape are once more in focus. A favoured talking point of the international commentariat in this regard is the so-called rise of the 'Global South' – referring to 85% of the world population across Africa, Asia, Latin America and Oceania.

But what really is the 'Global South'? As Policy Exchange's important and timely report shows, the concept is in fact entirely baseless on historical, economic and political grounds. It is bad enough that this makes it a poor analytical tool for explaining and predicting state behaviour. But what's more, the term is being actively promoted by our adversaries to damage our reputation globally, and to induce strategic doubt just when clarity is vital.

By applying an impressive cross-disciplinary approach – spanning intellectual and political history, economics and geopolitics – Policy Exchange's report dismantles the 'Global South' as a coherent community of states. The concept is an amalgam of anti-imperial, Marxist and postcolonial critiques of the world order – and specifically, of the West's standing within it. It therefore projects a narrative of world history which pitches 'the Rest' against a domineering West.

Yet, the 'Global South' has never been more economically diverse, nor its members more guided by their own interests. As the group lacks a compelling historical or political shared identity, it is vulnerable to co-optation by those with cynical ulterior motives.

This opportunity has not been lost on Russia and China – the two greatest threats to British security. As Policy Exchange's report demonstrates in rich detail, Moscow has returned to its Cold War playbook of sophisticated 'active measures' to foment anti-Western sentiment across Africa, Asia and Latin America. Meanwhile, Beijing is a relative newcomer to the 'Global South' club, but now also views the concept as a means to undermine the West and legitimise its own neo-imperialist expansion. In doing so, both seek to exert 'reflexive control' on our own policy to deter us from openly pursuing our national interests.

The UK cannot fall into this trap. Our Cold War generation of strategists were wise to the Soviet Union's manipulation of the 'Third World', and the essential need to counter poisonous Soviet disinformation. However, by adopting the principles of 'Global Southism' without question, current policymakers unknowingly do the jobs of our adversaries for them.

Policy Exchange's report is right to reject the 'Global South' as a framework for foreign policy and strategy. Instead of being sucked into a 'clash of civilisations' narrative which is stacked against us, we must be laser-focused on the specific material factors which determine state behaviour today. Through bilateral relationships, the Commonwealth, the G20, the Five Power Defence Arrangements, the UK Mission to ASEAN,

and our imminent accession to the CPTPP, the UK has strong existing partnerships with many 'Southern' states. We must build on these to counter the global rise of malign forces with an ambitious and cooperative vision for the future – not distracting debates about the past.

Admiral Lord West of Spithead GCB DSC PC, former *First Sea Lord and Security Minister*.

Executive Summary

The ‘Global South’ is a concept which does not reflect global economic and political reality, is being used against us by our adversaries, and leads us to poor strategy. It should not be used as a framing device for British foreign policy and strategic thinking. The ‘Global North-Global South’ binary, first formulated in the 1970s by development economists, is a crude aggregation of geographical, historical, and geopolitical trends. It is a decidedly unhelpful guiding principle for explaining state behaviour in key geopolitically contested regions. The ‘Global South’ should instead be understood as an ‘imagined community’ of loosely aligned states, rather than a genuine geopolitical bloc or historical phenomenon. Regional and thematic categories of states are more relevant and more useful.

The term is the latest in a line of paradigms which have all offered critiques of world order, and particularly, of the West. The term carries the intellectual baggage of 19th century critiques of empire, Marxist critiques of capitalism, and mid-to-late 20th century postcolonial critiques of Western foreign policy. It is incapable of offering objective analysis of political and economic dynamics, much less a framework for furthering British interests.

The immediate predecessor of ‘Global Southism’ is ‘Third Worldism’, which Soviet intelligence actively promoted and exploited during the Cold War. The Soviet Union developed a sophisticated array of ‘active measures’ to foment anti-Western sentiment and pro-Russian affinity across geopolitically key regions. The Russian Federation has returned to this playbook today, and advances ‘Global Southism’ as an ideological instrument in its conflict with the West. The People’s Republic of China has pursued a similar strategy since the 1950s.

The ‘Global South’ has no grounding in historical, cultural, political, or social facts. The term ‘lumps together 85% of the world’s population, spanning Africa, Asia, Latin America and Oceania. The label includes states that experienced colonisation, states that were never colonised, states that remained imperial powers well into the 20th century, and states that actively pursue neo-imperial aggrandisement today. There is no consensus definition for ‘Global South’ status; rather, the original ‘Brandt Line’ from the 1970s is occasionally updated on dubious grounds. This offers no intelligible foundation for analysing geopolitics or economics.

Since the 1970s, the ‘Global South’ has witnessed such divergent economic trajectories as to render the ‘North-South’ binary entirely economically incoherent. Eight of the world’s twenty richest countries by GDP are currently in the ‘Global South’. The BRICS+ group of nine

'Southern' states accounts for 30% of nominal global GDP – far higher than the EU's 19%. In purchasing power parity terms, BRICS+ accounts for slightly more of global GDP than the G7, and is expected to overtake the latter in nominal terms by 2050. Much of the wealthier 'Global South' has a higher GDP per capita than many European states.

As well as growth rates, other major contemporary economic trends cut across the artificial 'North-South' division, further undermining its analytical and predictive merits. International investment flows, interstate lending, critical material trade, and data storage and transfers are some of the most politically and economically consequential dynamics today, and all defy the simplistic binary presented by the 'Global South'.

There is no factual basis for viewing the 'Global South' as a geopolitical bloc – rather it is an amorphous assembly of states with different historical and contemporary grievances. The UN voting record demonstrates that the 'Global South' is better at signalling what it *against*, rather than what it is for. Despite the prevailing narrative that the 'Global South' has rejected Western pressure over Ukraine, its response has been far more nuanced, as two-thirds have refused to support Russia in the UN General Assembly. China has not been able to alter the UN voting habits of 'Southern' states significantly over the past decade. States still operate as sovereign actors, guided by their own interests and perceptions of the world.

The 'Global South' framework is being actively employed as a tool by states with geopolitical ambitions. In BRICS' self-promotion as a vehicle for 'Global South' causes, and India, Brazil, and China's bids to lead the bloc, it is clear that the label is being used as a cover for underlying objectives amidst geopolitical flux. Far from proving that the concept has any grounding in reality, this exhibits how the term is viewed as an effective device for accruing influence.

China and Russia weaponise the term to inflict reputational sabotage on the West in the 'Global South'. Their objective is to create a "clash of civilisations" narrative which alienates the West, and distracts us from our own strategic objectives. Moscow and, more recently, Beijing appeal to 'Global Southist' anti-Western tropes to create environments hostile to our interests. Their objective is threefold: to erode trust in Western institutions and the incumbent world order; to turn our partners against us; and to induce our strategic retrenchment and an aversion to the pursuit of interests.

Despite these conceptual and strategic perils, the 'Global South' has recently experienced an astronomical rise in popularity. The term's usage in English-language publications has increased 36-fold between 2000 and 2024. Most alarmingly, it has slipped into Western academic and policymaking circles without critical engagement. In the West, the last decade has also witnessed a proliferation of academic departments exclusively dedicated to the supposed bloc, and 'Global South'-focused government initiatives. The most concerning aspect is the slipshod reference of British policymakers to the term, without any critique of its

origins, its attendant world view, nor an understanding of how states are instrumentalising it towards their geopolitical objectives.

The Government's 'Global South' reset – a pillar of its 'progressive realism' foreign policy concept – has internalised the 'Global Southist' narrative which compels the West to pursue a concessions-based diplomatic policy, and shy away from openly pursuing its own interests. This soft power focus circumscribes our strategic engagement with crucial non-aligned regions which are increasingly governed by hard power logic. By internalising the 'Global South' narrative, the UK positions its values and interests at loggerheads, and compromises our ability to achieve either. This approach to foreign policy – which is an extension of the post-Cold War development and aid mindset – benefits the UK's adversaries, who invite our strategic hesitancy.

The decision to transfer sovereignty of the Chagos Islands to Mauritius is the Government's first major strategic blunder in the name of the 'Global South' agenda. The move has put the long-term future of the joint UK-US military base on Diego Garcia at jeopardy, given Mauritius' strong ties to China and the latter's growing presence in the region. One of the arguments in favour of this decision is that it supports the 'reset' of our relationships with the 'Global South' by signalling our so-called rediscovery of respect for international law. This is a direct application of the misguided strategic assumption at the heart of 'progressive realism', which seeks 'soft power' solutions to an environment increasingly governed by hard power. The message is that the UK is willing to forego its leverage and interests in the hope of future, unguaranteed benefits.

This questionable strategic approach to statecraft sets a concerning precedent for the Government's negotiating stance over climate reparations to the 'Global South'. Estimates for the UK's indemnities for historical emissions vary from £4bn-£240bn per year. The UK must not allow its rhetorical signalling to create high expectations for our receptiveness to 'Global South' demands, before we have determined our parameters and red lines in these negotiations. Reports that the Caribbean Community were planning to demand slavery reparations from the UK at this month's Commonwealth summit are a relevant cautionary tale.

The UK therefore needs a 'non-Global South' strategic approach to the 'Global South', which remains clear-eyed about how the term and attendant narrative is being used to disadvantage the West. The starting point is to construct bespoke regional strategies for the relevant regions, rather than basing policy on the one-size-fits-all 'Global South' framework. Ongoing geopolitical volatility requires us to be attuned to the predilection of nation states to act independently, in line with their interests.

Rather than lump the 'Global South' together, the UK must signal to its 'Southern' partners that it is able to differentiate them from China and Russia. The UK has developed deep economic and strategic partnerships with 'Southern' states, including the Commonwealth, the

G20, the Five Power Defence Arrangements, the UK Mission to ASEAN, and imminent accession to the CPTPP. The 'Global South' framework makes no attempt to account for the strength of these ties. Due credit should be given to these valuable relationships, through a brand of diplomacy which distinguishes between our partners and adversaries.

'Progressive realism' must be modified, so as to frame our opposition to the rising influence of external illiberal authoritarian states across the 'Global South' as a progressive objective. The UK must be attentive to the legitimate interests of 'Southern' states. But equally, we should be resolute that British interests and values align when it comes to competing with Russia and China, and upholding liberal values and the rule of law. The British diplomatic and strategic establishment should be unequivocal in signalling that this is a priority of 'progressive realism'.

This should be baked into a coordinated global offering with partners in the G7 and G20, defined along the lines of a 'New Growth Partnership'. The West has already launched a number of initiatives as a direct response to China's predatory global development programmes. But the UK and its partners should re-launch these with an overarching narrative based on cooperative economic development, climate risk mitigation, and respect for law and human rights – in stark contrast to our adversaries' offering.

A crucial component of the 'New Growth Partnership' will be finding further ways to harness private sector finance, such as through creative new public-private partnership models. In particular, UK Export Finance and British International Investment should be given further state financial support, more ambitious fund-raising targets, and a more risk-tolerant mandate to enable investment in strategically important sectors (such as mineral processing) in the 'Global South'.

75% of British aid funding should be ringfenced for programmes which directly support our overseas interests, with the rest available to purely humanitarian initiatives. The Government's upcoming review of its approach to international development is the perfect opportunity to reaffirm this policy instrument's role in economic statecraft. This is vital to enhance the effectiveness of our engagement in strategically important regions, and to resist the notion that humanitarian endeavours and national interests are incompatible.

The UK must back up its renewed commitment to the 'Global South' by establishing a diplomatic presence in every constituent state. The UK lacks consulates or embassies in too many 'Southern' countries, which limits our diplomatic, intelligence, political and economic efforts. This severely harms our capacity for strategic engagement.

MI6 should stand up a unit, modelled on the CIA's National Resources Division, to identify British and foreign citizens with business links in the 'Global South'. The aim is either to recruit them, or to receive valuable intelligence to form a granular understanding of the target business and political landscape. This would facilitate the formulation of a more strategic investment and diplomatic approach to the 'Global

South’ – particularly when it comes to navigating critical mineral markets, which are exceptionally opaque, and dominated by external powers with fewer moral qualms.

Finally, the UK must install more apparatus tasked with actively countering Russia and China’s disinformation campaigns, which sabotage our reputation with anti-Western conspiracies and ‘Global Southist’ tropes. Counter-disinformation capabilities must be fortified, such as by standing up a designated ‘Global South disinformation’ team in the National Security Secretariat, and ‘early warning’ regional units to track and analyse hostile informational warfare efforts.

Introduction

In recent years, the 'Global North-Global South' paradigm has become one of the most important intellectual concepts in the foreign policy world. The term was first introduced into academic discourse by development economist Willy Brandt, whose 1980 World Bank report delineated global economic development trajectories along the 'Brandt Line'. Only recently, however, the 'Global South' has experienced an extraordinary renaissance. No longer the preserve of development economists, sociologists, and critics of the West, the framework of a rich 'Global North' pitted against a poor 'Global South' has gone mainstream; so too have many of its presuppositions regarding global structural inequalities and historical wrongs.

As an analytic tool, the idea of the 'Global South' has no firm grounding in historical nor geographical reality. It lumps together 85% of the world's population across Asia, Africa, Latin America and Oceania, with no overarching logic beyond their absence from the post-Second World War, traditionally conceived 'West'. The 'Global South' includes states that suffered colonisation, states that were never colonised, states that remained imperial powers well into the 20th century, and states that actively pursue neo-imperial aggrandisement today.¹ Even more confusingly, its parameters are seemingly porous: since the Brandt Line's original 'North-South' categorisation, the UN has moved Israel and South Korea into the 'Global North', whilst Mexico and Bosnia Herzegovina have moved to the 'Global South'.² In the absence of official classifications, these changes are strikingly arbitrary.

Nor can the term make any serious claim to economic literacy. At the start of the year, eight of the world's twenty richest countries (by GDP) are members the 'Global South': China is second; India is fifth; Brazil is ninth; Russia—a self-proclaimed 'Southern' state, yet an indisputable part of the cartographic north and an explicitly imperial power—is eleventh with Mexico coming in twelfth. Indonesia is sixteenth, Turkey eighteenth, and Saudi Arabia nineteenth.³ In GDP per capita terms, the categories become even more bizarre: Saudi Arabia and Kuwait have a higher GDP per capita than Portugal. Puerto Rico and the Bahamas have a higher GDP per capita than Spain. The Seychelles have a higher GDP per capita than Romania. Despite over 25% of their populations being at risk of poverty or social exclusion, Bulgaria, Greece, and Latvia are all considered part of the wealthy 'Global North'.⁴

Indeed, the major economic flaw of the 'Global North-Global South' framework is that it cannot account for the seismic divergence in 'Southern'

1. Turkey was never a victim of colonisation, whereas Greece was colonised by the Ottomans; Estonia and Finland are not considered victims of Russian imperialism, but Russia is obliquely considered a victim of Western predation; the Ethiopian Empire only collapsed in 1974; China is arguably the greatest practitioner of neo-mercantilism across Asia, Africa, and Latin America of the 21st century.

2. UN Finance Centre for South-South Cooperation, Global South Countries (Group of 77 And China), [link](#).

3. World Bank, GDP (current US\$), [link](#).

4. Eurostat, Living conditions in Europe – poverty and social exclusion, June 2023, [link](#).

development trajectories over the last 50 years. Certain pockets of the ‘Global South’ have entirely defied the script – whether it be the oil-rich Gulf’s post-nationalisation boom; the ‘Asian Tigers’ from the 1950s to the 1990s;⁵ or, more recently, the entire Asian continent, which accounted for 57% of global GDP growth from 2015 to 2021.⁶ Nowadays, this bloc stratification is especially driven by the BRICS— whose nominal total GDP is now far larger than that of the EU.⁷ Alongside this, the growth in so-called ‘South-South lending’ undermines the prevailing narrative that neoliberal financial institutions are responsible for perpetuating ‘Global North-Global South’ inequalities—not least in view of the infamously predatory terms of China’s Belt and Road Initiative (BRI).⁸ In short, the structural and relational economic dynamics, which may have vaguely justified dualisation on material grounds in the 1970s, have shifted beyond recognition.

The propulsion of the ‘Global South’ into mainstream lexicon is more than a semantic misstep; in the words of the 19th century French philosopher Madame de Staël, “disputes about words are always disputes about things”.⁹ In this instance, it is the ideological baggage which accompanies the ‘Global South’ – which we might term ‘Global Southism’ – that makes it especially pernicious for Western policymakers today.

We have been here before. The ‘Global South’ is a descendant of the ‘Third World’, a Cold War term that went out of fashion due to the eventual absorption of most of the community into the global capitalist economy, as well as its supposedly condescending undertones.¹⁰ Both frameworks are imbued with a strand of intellectual thought which refutes the legitimacy of the Western-constructed world order. Both have sought to categorise states by projecting historical and structural trends on to the contemporary world, sharing the initial premise of the West’s ill-gotten privilege, and the illegitimate nature of the global order. And both have been used as weapons by our geopolitical adversaries to undermine that architecture. At a time when it is vitally important to have clarity about the turbulent state of geopolitics, and that the declared goal of the UK’s adversaries is to build a dystopian ‘multipolar world’ that replaces the liberal order, the extent of buy-in to the ‘Global South’ narrative is a source of concern.

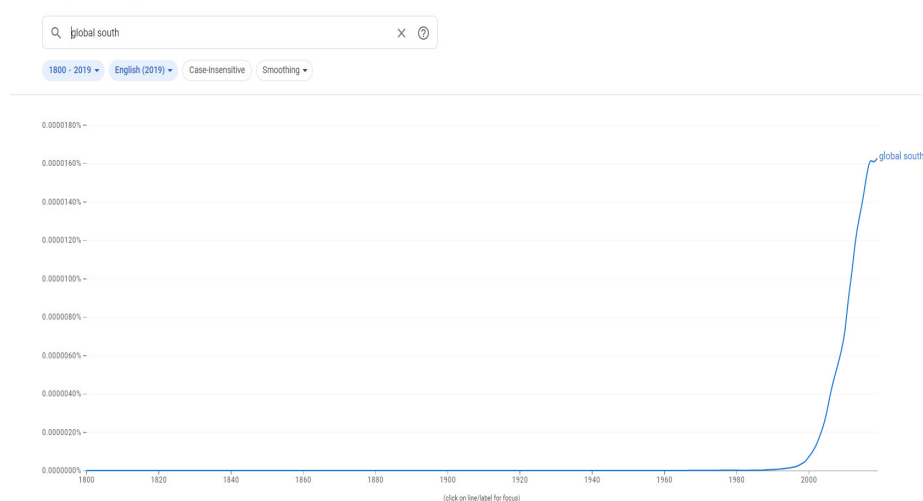
Indeed, this narrative has gathered steam in recent years, invariably along the lines that the West “is losing” the ‘Global South’,¹¹ or “taking it for granted”.¹² So the story goes, the West has been left isolated internationally over the Ukraine War;¹³ exhibits flagrant hypocrisy by simultaneously condemning Moscow and supporting Jerusalem; risks environmental catastrophe by ignoring the developing world’s pleas for climate mitigation assistance;¹⁴ and is impotent in the face of a mounting clamour for the “fairer and more democratic multipolar world order” recently pledged by Russia and China.¹⁵ In the last year, India has hosted three Voice of Global South summits. BRICS—a bloc that was infamously coined as an emerging markets trading strategy at one of the world’s largest investment banks –¹⁶ has welcomed four new members this

5. Typically including Singapore, Hong Kong, South Korea and Taiwan.
6. Jeongmin Seong et al., Asia on the cusp of a new era, *McKinsey Global Institute*, 22 September 2023, [link](#).
7. European Parliament, Expansion of BRICS: A quest for greater global influence? March 2024, 1.
8. Brahma Chellaney, China’s Trojan Gift: Creditor Imperialism, *CEPA*, 24 December 2021, [link](#).
9. Madame de Staël, *On Germany*, 1810.
10. Leigh Anne Duck, The Global South Via the US South, in *Concepts of the Global South*, *University of Cologne*, 2015, 5.
11. Mathew Burrows and Aude Darnal, Red Cell: Is the West losing the Global South, *Stimson*, 10 December 2022.
12. Baroness Ashton, Stop taking the Global South for granted, *Chatham House*, 2 February 2024, [link](#).
13. Timothy Garton Ash and Mark Leonard, The West may be more united, but it’s also more isolated, *Politico*, 23 February 2023, [link](#).
14. Ravi Agrawal, Why the World Feels Different in 2023, *Foreign Policy*, 12 January 2023, [link](#).
15. The Kremlin, Media statement following Russia-China talks, 16 May 2024, [link](#).
16. Jim O’Neill, Building Better Global Economic BRICs, *Goldman Sachs*, 30 November 2001. Originally including Brazil, Russia, India, China and South Africa.

year,¹⁷ and has recast itself as a 'Southern' G7.¹⁸ The G77—another relic of the 'Third World' era and a major institutional exponent of 'Global Southism'—received a tremendous boost this year when UN Secretary General António Guterres declared that the group's quest for multipolarity "creates opportunities for justice and balance in global relations."¹⁹

If this rhetoric were confined to the UN General Assembly's dais, or the propaganda departments of illiberal dictatorships, it would not necessarily pose a threat. However, the concept of the 'Global South' has diffused with alarming alacrity throughout Western international institutions and national governments. What is more, as its usage has mushroomed, surprisingly little regard has been given to its historical origins.

The UN organises its statistical data along North-South categories,²⁰ and there has been an explosion of 'Global South'-themed academic programmes across Western universities. It has increasingly caught on in Western governments as well: Canadian Prime Minister Justin Trudeau launched a new initiative to support civil society and environmental campaigners working in the 'Global South' this year;²¹ and both the Scottish devolved government and French government have launched Global South-specific initiatives in recent years.²²⁻²³ According to Google's Ngram Viewer, usage of the term 'Global South' in English-language books has increased 36-fold between 2000 and 2024.²⁴ In light of this proliferation, the *Financial Times* featured 'Global South' as the phrase that defined the year 2023.²⁵



Google Ngram Viewer of 'Global South' usage. [Source](#)

Until recently, the 'Global South' had not appeared in major British foreign policy speeches nor strategic documents. Instead, it remained limited to serving as a framing device for governmental departments and agencies concerned with soft power and international development.²⁶ To the extent that these policy instruments became increasingly detached from wider global strategy – what one may call 'statecraft' – following the end of the Cold War, 'Global Southism' as a construct developed beyond the realms of geopolitics and, as a corollary, considerations of interstate

17. Adding the UAE, Iran, Egypt and Ethiopia. Saudi Arabia is currently considering its offer for membership.
18. Joseph Cotterill et al., China urges Brics to come geopolitical rival to G7, *Financial Times*, 20 August 2023, [link](#).
19. Antonio Guterres, Press Conference by Secretary-General António Guterres at United Nations Headquarters, UN, 8 February 2024, [link](#).
20. For example, see UNCTAD Handbook of Statistics 2023, UNCTAD, 14 December 2023, [link](#).
21. Prime Minister of Canada Office, Canada announces over \$30 million in initiatives during third Summit for Democracy, 20 March 2024, [link](#).
22. Institut de Recherche pour le Développement, French government, <https://en.ird.fr/our-identity>.
23. Scottish Government, International development: Global South Panel, 22 October 2022, [link](#).
24. Google Books Ngram Viewer, 'Global South', [link](#).
25. Alec Russell, Year in a word: 'Global South', *FT*, 31 December 2023, [link](#).
26. For example, A. Joshi et al., Gender and Taxi Policies in the Global South, FCDO, 26 May 2020, [link](#); B. Coe and K. Nash, Regionalised governance in the Global South, FCDO, 23 May 2023, [link](#).

competition.

Over the past few years, this has started to change. The phrase has become a mainstay of the international analyses of British policymakers and politicians. Last year, then-Foreign Secretary James Cleverly urged the UK and its allies to be more attentive to the views of the ‘Global South’ on international affairs.²⁷ In March’s marathon House of Lords debate on foreign affairs, the term featured twelve times.²⁸

The most significant step towards the full integration of ‘Global Southism’ into British foreign policy was taken by new Foreign Secretary David Lammy, reflected in his concept of ‘progressive realism’. Lammy has committed to three ‘resets’ of foreign policy, one of which is towards the ‘Global South’.²⁹ In order to revamp relationships with this community, Lammy intends to bring an end to what he calls the Conservatives’ “callous” approach to ‘Southern’ states, and instead work alongside them as equals in the pursuit of environmental, developmental and global governance goals.³⁰ Thus, it can be said that ‘Global Southism’ has moved beyond the purview of international development, and is set to constitute a pillar of the overarching framework of foreign policy.

Unfortunately, despite the best intentions, the adoption of an intellectually flawed paradigm is more than just an academic misstep. In fact, subscribing to the ‘Global South’ narrative in such an uncritical way risks two strategically pernicious consequences.

Firstly, the principles and objectives embedded in ‘Global Southism’ can clash with a strategy orientated around national interests. This owes to the concept’s intellectual origins in movements which, at their core, advocate a redistribution of economic and political power away from the West. In the form of policy framework, the ‘Global South’ has proved most compatible with international development – largely due to its evolution into a wholly astrategic instrument of state power, absent a compelling case for its function in securing national interests.

If these principles are projected on to wider foreign policy and strategy, and if we frame the improvement of our relationship with the ‘Global South’ as an end in itself, our engagement with these regions will be dictated, and judged, solely by our willingness to accept concessions. Such policymaking depends entirely on the unproven assumption that soft power can influence the strategic calculations of other states – even as it begins from the premise that the ‘Global South’ is more interests-driven than ever before. Adopting such a position will inevitably invite pressure, as demonstrated by this month’s Commonwealth summit, when the Government was forced to rule out slavery reparations amidst reports that the Caribbean Community were planning to make demands.³¹

The decision to accept Mauritian sovereignty over the Chagos Islands is the first major application of this vision of statecraft to the current geopolitical environment. The UK has traded off material power (through agreeing to pay Mauritius for continual usage of the Diego Garcia military base), and weakened the long-term viability of its strategic position in the Indian Ocean, in the unguaranteeable expectation of currying favour with

27. Patrick Wintour, UK minister says west must learn to listen better to global south, *The Guardian*, 20 September 2023, [link](#).

28. UK Parliament, Foreign Affairs House of Lords Debate, *Hansard*, Volume 836, 5 March 2024, [link](#).

29. UK Gov, Reconnecting Britain for our security and prosperity: Foreign Secretary David Lammy’s statement, FCDO, 6 July 2024, [link](#).

30. David Lammy, The Case for Progressive Realism, *Foreign Affairs*, May/June 2024, [link](#).

31. Dominic Penna, Starmer rules out slavery reparations to Caribbean countries, *The Telegraph*, 14 October 2024, [link](#).

the 'Global South'.

Secondly, blank adoption of the strategic framework of the 'Global South' leaves the UK exposed to the ways in the term has emerged as a geopolitical tool. As with 'Third Worldism', ambitious 'Southern' states are understandably seeking to leverage the term's newfound emotive purchase. Thus, we see the likes of India, Brazil, and other BRICS members appealing to the concept to push their various economic and political agendas.

However, the most alarming cases are Russia and China, two of the most enthusiastic proponents of the 'Global South', and self-professed enemies of the West. They have two objectives. The first is to exercise "reflexive control" over our policy, boxing it within a framework over which they exercise preponderant influence, and seeking to induce our self-imposed strategic retrenchment from geopolitically contested regions. The second is to weave a narrative which coaxes non-aligned countries into wittingly or unwittingly supporting their agenda to undo the U.S.-led economic, political, and security order. Thus, just as other actors apply the 'Global Southism' to further their objectives, the UK is adapting its objectives to further 'Global Southism'. This places us at a distinct disadvantage when formulating effective foreign policy towards strategic objectives.

The best course of action is therefore to abandon the term altogether both as a guiding principle for understanding global dynamics and, more importantly, as a foreign policy framework. History, geography, economics, and politics will always be the best guides to understanding the interests of nations, and of the trajectory of world order more broadly. The narrative of the 'Global South' obfuscates more than it elucidates by painting over the particular interests of individual states with a generalising narrative, turning distinct regions into an incoherent monolith. Perhaps most damagingly, the term makes no attempt to differentiate between the UK's long list of 'Southern' partners and its adversaries China and Russia. It is a bad basis for partnership, and a bad basis for policy.

This does not, of course, mean to deny the legitimate views of relevant countries: there are certainly unanswered questions about economic development, environmental issues, representation in multilateral fora, among many other questions. Equally, it goes without saying that developing countries can, and will, assemble in whatever coalitions they see fit. Nonetheless, being attentive to the interests of our partners in the developing world does not correspond to the unquestioning adoption of a framework with no basis in reality, that is being openly and cynically co-opted, and that rejects the legitimacy of much of the international architecture. The UK, with its deep historical and contemporary links to many 'Southern' countries, should know better and do better. The debate is not simply a semantic one, but has implications for the ongoing struggle to shape the world order. There has been no better, or more necessary, moment to offer a rebuttal.

Chapter I: The Conceptual History of the 'Global South'

The 'Global South' framework descends from 19th century critiques of empire, Marxist critiques of capitalism, and mid-to-late 20th century postcolonial critiques of the global economic system and Western foreign policy. These inherently political roots render the framework incapable of offering an impartial analysis of global political economy today. The 'Global South' framework, like its developmentalist predecessors, contains an inherent moral critique of capitalism and, more broadly, of any Western policy which seeks to perpetuate the global politico-economic world order. 'Global Southism' is thus a concept designed to delegitimise the global architecture which has enabled the West (reframed as the 'North') to acquire economic and political capital. It is an ideology which forms the kernel of a fundamentally revisionist movement.

The roots of the 'Global South' in the politics of grievance have made it all-encompassing, allowing it to coalesce a broad church of states: some of which seek outlets of international influence; some of which seek recognition and support from the West; and others still with far more expansive and malign foreign policy goals. It therefore comprises what the political scientist Benedict Anderson calls an 'imagined community', a loosely defined entity of constituents where "in the minds of each lives the image of their communion".³²

This chapter picks up the historical origins of 'Global Southism' from the post-1945 genesis of economic developmentalism. It was at this moment that two hundred years of anti-imperialism, anti-colonialism and Marxism fused with 20th century political and economic analysis, thereby providing a particularly normative interpretation of interstate dynamics. For those interested in the pre-1945 intellectual origins of the 'Global South', see the conceptual history provided in the Appendix.

1.1: 20th Century Developmentalism

The First and Second World Wars had both a terminal effect on the endurance of empire, and a catalysing effect on independence movements across the world. Britain and France held on, and even expanded, their overseas territories after 1918, often under the aegis of the League of Nations and its mandate system. But the Second World War devastated empire forever. Three factors converged to produce decolonisation: the

32. Benedict Anderson, *Imagined Communities: reflections on the origin and spread of nationalism*, (London: Verso, 1991), 6.

vast economic and human toll that defeating Nazi Germany took on the West; the rising power of independence movements; and the decolonising impetus of the world's new superpower: the United States (US). Under the American aegis, the Western *modus operandi* became economic rather than territorial integration of the rest of the world, particularly since the US policy establishment largely opposed formal imperial rule.³³ The Soviet Union consciously offered another model for the global order, opposing American capitalism and offering a far more aggressive version of the support extended by Lenin to global liberation movements. It was within this globalising and ideologically-charged milieu that developmentalism emerged.

1.2: Orthodox Capitalist Developmentalism

As an intellectual endeavour, orthodox developmentalism is an economic theory which seeks to address inter-state inequality by plotting the route to advancement for less developed countries via internal reform and integration into the global capitalist system.³⁴ Developmental theories magnify Marxist class analysis to global proportions, as they divide the world into categories determined by access to capital and the means of production. All early proponents shared this basic framing of global dynamics, but varying political inclinations dictated the trajectory of developmentalism over the proceeding decades.

American President Harry Truman saw a quest to end imperialism, and to assist the less developed regions of the world, through the lens of the Cold War battle of ideologies. For him, it was a battle between the “Communist philosophy... [which is] a threat to the efforts of free nations to bring about world recovery and lasting peace”, and the US-driven “programme of development based on the concepts of democratic fair-dealing.”³⁵ Truman therefore separated the global community into three categories: developed (mostly Western) states; the expanding Communist bloc; and the collective of less developed, emerging and newly independent nations.

Per these Cold War origins, the movement also had a geopolitical dimension: to encourage newly-independent states to join the US-led order, rather than the Soviet-controlled communist bloc. This impetus was particularly acute given the Soviet Union's early success in exerting influence – either via ideological attraction or forcibly agitating for regime change – across Africa, Latin America and Asia.

The US dominated newly-established financial institutions, such as the World Bank and the International Monetary Fund (IMF).³⁶ Encouraging orthodox economic development via integration into the global capitalist system later came to be known as the ‘Washington Consensus’.³⁷ At its core, this theory of developmentalism comprises the orthodox view, whereby socio-economic progression depends on subscribing to capitalist ‘best practices’ and full integration into the liberal free-market. Orthodox developmentalists were afforded a pro-capitalist academic and intellectual basis by Walt Rostow's *The Stages of Economic Growth: A Non-communist Manifesto*

33. A. G. Hopkins, Globalisation and Decolonisation, in Kate Law (ed), *The Decolonisation of Zimbabwe*, 1st ed., (London: Routledge, 2020), 14.

34. Debraj Ray, *Development Economics*, (New Jersey: Princeton University Press, 1998), 7.

35. Truman's Inaugural Address, 1949.

36. Patrick Sharma, The United States, the World Bank, and the Challenges of International Development in the 1970s, 2013, *Diplomatic History* 37 (3), 582-585.

37. See John Williamson, What Washington Means by Policy Reform, *Peterson Institute for International Economics*, 1 November 2002, [link](#).

(1960), which sought to lay the universal blueprint for development along these lines.³⁸

1.3: Capitalism-Critical Developmentalism

Orthodox Developmentalism's fundamental acceptance of the fairness and functionality of the global economic system was not without its detractors. Heterodox strands of developmentalism arose, challenging the notion that underdevelopment stems from endogenous problems within less developed countries. Critics instead point to embedded historical and ongoing inequalities within the international order.

The seminal intellectual movement in this regard is 'dependency theory', which portrays the modern global economic order as one defined by bifurcated, deeply-entrenched inequality between exploited 'periphery' countries, and those of the wealthier 'core'. The theory is attributed to the economists Hans Singer and Raúl Prebisch, who devised the 'Prebisch-Singer Thesis', which emerged from two papers published in 1949. Based on research conducted primarily in Latin America, the authors asserted that, as the terms of trade for underdeveloped countries had deteriorated during the imperial era, orthodox integration into the global economic order would merely perpetuate their industrial disadvantage in favour of more advanced states. They instead argued that developing countries should employ protectionist import-substitution economic policies, rejecting the Washington Consensus-prescribed trade-and-export model.³⁹

By blaming structural oppression and pointing to an in-built class hierarchy within the international system, dependence theory has a *bona fide* Marxist genealogy. It is unsurprising, then, that the theory appealed to Marxist intellectuals, notably Paul A. Baran, the Stanford University economist who synthesised dependency theory and Marxist class analysis in his 1957 *The Political Economy of Growth*. Others transposed dependency theory's core-periphery binary to the colonial experience, such as Guyanese political activist Walter Rodney's hugely influential *How Europe Underdeveloped Africa*. The 20th century heterodox developmentalists and post-colonialists were thus united by the emphasis they placed on addressing structural global inequalities to spur development. This had the added effect of reducing any emphasis on political and economic reform within the so-called 'Third World', while also appealing to nationalist and nativist creation stories in many newly-independent states.

The convergence of anti-colonialism and Marxism is encapsulated in the works of Immanuel Wallerstein, the doyen of dependency studies. By his own acknowledgment, Wallerstein's magnum opus – *The Modern World-System* – was consciously inspired by Marx's critique of capitalism, as well as the radical anti-colonialist Frantz Fanon – who represented for Wallerstein "the persons left out in the modern world-system."⁴⁰ Wallerstein added a third category of state to dependency theory's binary, the 'semi-periphery', whose structural function in the world order was to facilitate the flow of raw materials, labour and capital between poor and wealthy.⁴¹ This addition reflected the post-war development trajectories of newly

38. Walt Rostow, *The Stages of Economic Growth*, 3rd ed., (Cambridge: Cambridge University Press, 2012).

39. Raúl Prebisch, 'The Economic Development of Latin America and its Principal Problems, 1950', reprinted *Economic Bulletin for Latin America*, 1962 7 (1), 1-22.

40. Immanuel Wallerstein, *The Essential Wallerstein*, (New York: The New Press, 2000), Introduction, accessed via [link](#).

41. Immanuel Wallerstein, *The Modern World-System I: Capitalist Agriculture and the Origins of the European World-Economy in the Sixteenth Century*, (Los Angeles: University of California Press, 2011), 288.

industrialising economies such as South Korea, Nigeria, and Mexico. The activist Walter Rodney adumbrated this framework in 1973 with *How Europe Underdeveloped Africa*, which in effect contends that European industrialisation was entirely contingent on the Atlantic slave trade and the extraction of resources from Europe. Here again, we can see how developmentalism shifted towards being a broad amalgamation of structuralist criticisms of the current world order, ambitions for decolonisation and independence, and attempts to rationalise the increasingly divergent industrialisation stories of developing economies.

1.4: 'Third Worldism'

As these intellectual frameworks came about, another concept gained in popularity: 'Third Worldism'. This divided the international community into three blocs – democratic liberal states, Communist states, and non-aligned states. The phrase was reportedly first coined in the 1950s by the French demographer, Albert Sauvy, in order to draw attention to the existence of a community of nations peripheral to the Cold War contest. Notably, Sauvy consciously referred to the Third Estate prior to the French Revolution – a nod to the sizeable population excluded from France's pre-revolutionary political life. 'Third Worldism' offered a trifurcated world order, akin to Wallerstein's world-systems theory, but shifted emphasis from Marxist structuralism to a more geopolitical rationalisation of global dynamics.

The Cold War context resulted in a wave of politically-motivated 'Third World' initiatives, beginning with the 1955 Bandung Conference, a meeting of mostly newly-independent African and Asian states. The conference's aims were to promote cooperation of likeminded nations, and to chart a course towards modernisation independent of Cold War geopolitical bipolarity. Asian-African solidarity envisaged by the conference waxed and waned throughout the ensuing decades, but the 'spirit of Bandung' animated subsequent initiatives to bring together a loose and vaguely defined coalition of formerly colonised, developing, and even imperial countries.⁴² The result was a proliferation of new multilateral fora, such as the Organisation of Solidarity with the People of Asia, Africa and Latin America (1966), the G77 (1967), and the New International Economic Order (1974).

The 'Third Worldist' movement sought to chart a depoliticised 'third way' between the US and the USSR, but the sheer economic and ideological pull of the two superpowers made alignment inevitable. The Non-Aligned Movement (NAM), established in the 1960s, is perhaps the best example of this inability to withstand geopolitical headwinds. Initially, there was a great deal of cross-pollination between the NAM and Bandung Conference.⁴³ But suspicions towards China, and towards Indonesia's conciliatory attitude towards the Soviet Union, created rifts within the group. This gave rise to infighting within the original Bandung members and, as a result, India, Yugoslavia and the United Arab Republic (Egypt and Syria) organised rival conferences of non-aligned states.

42. This mishmash of states attending the first Bandung Conference is revealed by a glance at a few constituent histories. Saudi Arabia, Afghanistan and Iran were never subject to formal colonisation, whilst the Gold Coast remained a British colony until 1957 – 2 years after the 1955 Bandung Conference. Meanwhile, the Japanese Empire had collapsed only eight years prior, whilst the Ethiopian Empire endured until its overthrow in 1974 – nearly 20 years after Bandung.

43. Indonesian President Sukarno and Indian Prime Minister Jawaharlal Nehru were key organisers of both the Bandung Conference and Non-Aligned Movement

Consequently, the second Bandung Conference, scheduled for Algiers in 1965, was indefinitely postponed.

The previous year, the UN Conference on Trade and Development (UNCTAD) founded the G77 – the first major assembly of 'Third World' states in the UN. The G77's first major meeting was held in 1967 in Algiers, symbolising in a way how the Bandung spirit lived on, despite the second conference's failure. Under the leadership of Raúl Prebisch, the development economist who was appointed UNCTAD's first Secretary-General, the 77 developing countries agreed to the Charter of Algiers, a suite of common positions on issues ranging from apartheid in South Africa, to global disarmament, to international institutional reform. The G77's founding mission was to marshal member states around shared interests, in order to present a numerically significant UN voting counterweight to the developed world-centric OECD.⁴⁴

As the 'Bandung spirit' shapeshifted across these various initiatives, 'Third Worldism' is therefore best seen as something of a moveable feast. In the words of two members of the US National Security Council in 1976, "the Third World is neither a group of countries nor a series of issues: country and issue alignments shift. At this point it probably would be fair to say that *the Third World is a state of mind*."⁴⁵ The movement's central principle was thus that underdevelopment is a feature, rather than a bug, of the international system, and that the 'developed world' – meaning the West – has intentionally stacked the deck in its favour. Despite the broad church that this grievance attracted, it consistently failed to unify the political and economic aims of constituent states. This limited the successes of the various 'Third World' endeavours over the years.

From within the 'Third World', left-wing intellectuals adumbrated the basic framework set out by Western thinkers over the course of the previous century. Perhaps most important is the 1961 work of Franz Fanon, *The Wretched of the Earth*, which sets out an existential battle between colonialism and anti-colonialism, and a rather sweeping claim to indemnities from the so-called "metropole":

"We are not blinded by the moral reparation of national independence; nor are we fed by it. The wealth of the imperial countries is our wealth too... From all these continents under whose eyes Europe today raises up her tower of opulence, there has flowed out for centuries toward that same Europe diamonds and oil, silk and cotton, wood and exotic products. Europe is literally the creation of the Third World."⁴⁶

Gradually, the Third World began to organise along the lines of this narrative, with the G77 coalescing in 1963 as "something akin to a trade union of Third World governments".⁴⁷

Under the mounting pressure of this international context, Western academic and political circles began to internalise the narrative that the West was entirely responsible for the underdevelopment trap of the 'Third World'. An influential individual in this regard was the Stanford economics professor, Paul A. Baran, who wrote *The Political Economy of Growth*, which

44. Edgar J. Dosman, Raúl Prebisch and the XX-Ist Century development challenges, *United Nations ECLAC*, 14 April 2022, 16, [link](#).

45. Robert S. Smith and David Lazar, Memorandum From Robert S. Smith and David Lazar of the National Security Council Staff to the President's Deputy Assistant for National Security Affairs (Hyland), Washington, November 29, 1976, *Foreign Relations of the United States, 1969-1976, Volume E-14, Part 1, Documents on the United Nations, 1973-1976*, italics added by author, [link](#).

46. Franz Fanon, *The Wretched Earth*, trans. by Constance Farrington, London: MacGibbon & Kee, 1965), 81.

47. Giuliano Garavini, *After Empires: European Integration, Decolonization, and the Challenge from the Global South 1957-1986*, (Oxford: Oxford University Press, 2012), 38.

became a staple in American and European university reading lists. In it he advanced a model for the 'undevelopment' cycle afflicting 'Third World' countries, which went as follows:

"To the dead weight of stagnation characteristic of pre-industrial society was added the entire restrictive impact of monopoly capitalism. The economic surplus appropriated in lavish amounts by monopolistic concerns in backward countries is not employed for productive purposes. It is neither plowed [sic] back into their own enterprises nor does it serve to develop others."⁴⁸

This line of argument was popularised in the UK in particular by the academic Peter Townsend. In his *Concept of Poverty*, he argued that "the poverty of deprived nations is comprehensible only if we attribute it substantially to the existence of a system of international social stratification... [in which] the wealth of some is linked historically and contemporaneously to the poverty of others."⁴⁹ To this he attributed colonialisation and a world economic system which had been designed to perpetuate economic and political inequalities. Such views took hold in certain elements of Western society, as witnessed by a pamphlet published by a group of Cambridge students on the West's moral obligations to the 'Third World': "we took the rubber from Malaya, the tea from India, raw materials from all over the world and gave almost nothing in return."⁵⁰

As would be expected, political leaders and activists from the 'Third World' seized upon these buds of Western moral indecisiveness to promote their agendas. During a state visit to London in 1975, Tanzanian President Julius Nyerere asserted that, "if rich nations go on getting richer and richer at the expense of the poor, the poor of the world must demand a change."⁵¹

PUSHBACK AGAINST WESTERN GUILT IN THE 'THIRD WORLD'

Not all thinkers in this period conformed to the perception that the West was the root cause of underdevelopment. Some pushed back against the narrative by reasserting the benefits of free trade, and challenging the assumption that development aid and central planning would pull the 'Third World' out of poverty. Crucially, they emphasised that each state is a product of its own historical context, thereby discrediting the concept of a homogenous 'Third World' altogether.

The trailblazer in this regard was the development economist Peter T. Bauer. The time he spent living and working in Malaya and West Africa in the 1940s led to several convictions: that there was no blanket remedy for underdevelopment; that development aid can perpetuate social, economic and political *malaise*; and that the 'Third World' would have to go through a multicentennial process of economic growth, just like the West.

His magnum opus, *Equality, the Third World, and Economic Delusion* (1981) served as a rebuttal to the 'guilt mindset' taking root in the West at

48. Paul A. Baran, *The Political Economy of Growth*, (New York: Monthly Review Press, 1957), 177.

49. Peter Townsend, *The Concept of Poverty*, (London: Heinemann, 1970), 41-44.

50. Pamphlet quoted in Peter T. Bauer, *Equality, the Third World, and Economic Delusion*, (Massachusetts: Harvard University Press, 1981), 67.

51. Quoted in *ibid.*, 69.

the time. In it, he took a historically-informed axe to many of the presuppositions of 'Third Worldism'. In reference to Afghanistan, Chad, Bhutan and others, he notes that "the poorest and most backward countries have until recently had no external economic contacts and often have never been Western colonies. It is therefore obviously that their backwardness cannot be explained by colonial domination or international social stratification."⁵² On the flipside, "the materially more advanced societies and regions of the Third World are those with which the West established the most numerous, diversified and extensive contacts" – citing, *inter alia*, cash-crop countries in South-East Asia, and mineral-producing regions of Africa and the Middle East.⁵³ He argues that this trend – rather than the supposed perennial subjugation of other regions by the West – is the historical takeaway regarding the global economy. Indeed, he noted how these success stories are a direct replica of medieval Europe, when the most developed parts of Central and Eastern Europe were those which were most in contact with prosperous France, the Low Countries and Italy. After surveying 19th and 20th century development trajectories, he concludes that, "wherever local conditions have permitted it, commercial contacts with the West... have eliminated the worst diseases, reduced or even eliminated famine, extended live expectation and improved living standards."⁵⁴

Rather than blame 'Third World' plights on Western predation, Bauer points to a number of constraints on development: the politicised fracturing of the global economy during the Cold War, which severed some 'Third World' states' contact with advanced capitalist economies; local socio-political conditions which suppressed enterprise and corporation growth; and statism.⁵⁵ He held no punches for 'Third World' politicians "who have promised a prosperity which they cannot deliver"⁵⁶, and expressed intense scepticism about Western aid programmes which merely sustain the status quo, and too frequently encourage the protectionist tendencies of elites. Indeed, as a free market economist, he was entirely suspicious of those developmentalists calling for the ever-larger "transfer of resources from the taxpayer of a donor country to the government of a recipient country."⁵⁷

Far from writing off developing countries' prospects, Bauer railed against "the exponents of Western guilt... [who] patronise the Third World by suggesting its economic fortunes past, present, and prospective, are determined by the West."⁵⁸ And far from being a controversial apologist for the West who was unwilling to accept reality, he has been lauded by some of the most influential development economists since. New York University professor William Easterly, for example, cited Bauer as he corroborated much of his theory in his empirical studies on the history of aid in 2003, 2006, and 2009. Meanwhile, the Indian economist and Nobel Laureate Amartya Sen, in his introduction for a collection of Bauer's essays (2009), remarked that "the originality, force, and extensive bearing of his writings have been quite astonishing... I feel privileged to be able to offer this letter of invitation."⁵⁹

52. *Ibid.*, 67.

53. *Ibid.*, 70.

54. *Ibid.*, 73.

55. *Ibid.*, 73.

56. *Ibid.*, 74.

57. Peter T. Bauer, N. H. Stern on Substance and Method in Development Economics, *Journal of Development Economics*, 1975 (2), 396.

58. Peter T. Bauer, *From Subsistence to Exchange and Other Essays*, (New Jersey: Princeton University Press, 2009), 72.

59. *Ibid.*, 2.

In this meeting of 'Third World' and Western minds, the Soviet Union saw an opportunity to weaken its collective adversary both externally and from within. It thus embarked upon a campaign to advance the anti-Western 'Third World' narrative, promoting the idea that poverty and underdevelopment is a consequence of Western exploitation and colonialism. This served the dual purpose of absolving itself of responsibility for geopolitical tension, and gaining political currency in the 'Third World'.⁶⁰

SOVIET WEAPONISATION OF 'THIRD WORLDISM'

In the aftermath of the Second World War and with the onset of a wider global competition, the Soviet Union lacked the resources or attention span to reach out to the 'Third World'. At any rate, Stalin, with his Manichean worldview, saw the non-aligned members of the 'Third World' as fellow class-enemies insofar as they were not communist.

It was only with the ascension of Nikita Khrushchev that a more 'tolerant' view was taken, and the Soviet Union sought to reach out to the 'Third World' more aggressively. In 1957, the Soviets created the Institute of World Economy and International Relations, intended to be an "instrument for strategic policy planning in the Third World".⁶¹ Already by 1960, British Prime Minister Harold Macmillan gave the famous "Wind of Change" speech, proclaiming:

"I see it the great issue in this second half of the twentieth century is whether the uncommitted peoples of Asia and Africa will swing to the East or to the West. Will they be drawn into the Communist camp? Or will the great experiments in self-government that are now being made in Asia and Africa, especially within the Commonwealth, prove so successful, and by their example so compelling, that the balance will come down in favour of freedom and order and justice?"⁶²

By 1961, KGB Chairman Aleksandr Shelepin convinced Khrushchev of the merits of supporting the 'Third World's' anti-imperial movements as a serious forward strategy against the US and, before his political demise in 1964, the Soviets sponsored an estimated 6,000 projects across the 'Third World', including no small number of dead-end "Red Elephant" projects.⁶³

While the economic logic of this policy shifted over time, the outreach to the 'Third World' remained a crux of the Soviet Union's political warfare until its demise. This was especially the case during and after the drama of the US invasion of Vietnam, which gave the Soviet Union an opportunity to associate the US with its former imperial allies. Soviet propaganda linked the economic logic of this argument, with one commentator stating: "having found it impossible to reshape the political map of the world as it did in the past, imperialism is striving to undermine the sovereignty of liberated states in roundabout ways, making particularly active use of economic levers."⁶⁴

60. Prospects for the North-South Dialogue, Directorate of Intelligence, CIA, 27 January 1984, 7-10.

61. Garavini, *After Empires*, 16.

62. Harold Macmillan, The Wind of Change Speech, 3 February 1960, [link](#).

63. Christopher Andrew and Vasili Mitrokhin, *The World Was Going Our Way: The KGB and the Battle for the Third World*, (London: Basic Books, 2006), 52-53.

64. K. Brutents, *Pravda*, 10 January 1986, trans. In FBIS/USSR International Affairs, 14 January 1986, quoted in Alvin Z. Rubinstein, *Moscow's Third World Strategy*, (New Jersey: Princeton University Press, 1988), 245.

Left-wing Western intellectuals corroborated this argument, with the philosopher Bertrand Russell opining:

*“The United States today is a force for suffering, reaction and counter-revolution the world over. Wherever people are hungry and exploited, wherever they are oppressed and humiliated, the agency of this evil exists with the support and approval of the United States . . . [which went to war in Vietnam] to protect the continued control over the wealth of the region by American capitalists”.*⁶⁵

Needless to say, this gave the Soviet Union another outlet of influence inside of Western societies. A barrage of anti-Western propaganda rained down on ‘Third World’ and left-wing Western audiences, such as the writings of Soviet Africa expert Ivan Potekhin: “Why is there little capital in Africa? The reply is evident. A considerable part of the national income which is supposed to make up the accumulation fund and to serve as the basis of progress is exported outside Africa without any equivalent.”⁶⁶

As the Italian historian Giuliano Garavini writes, “Third Worldism... was to become for more than a decade the lens through which the majority of Europeans—students, labour and Catholic movements, and the bulk of militants of mass political parties, each with their own distinct accent or perspective—understood the crisis of nationalism, the emancipation of the Third World, and the waning influence of the Cold War”.⁶⁷ A particularly astute CIA cable remarked that “European socialists and their allies see [Lower-Developed Countries] as the international equivalent of the underclass within their own societies [and therefore] seek to harmonise their international attitudes with their domestic policies of economic and social reform”.⁶⁸ The CIA concluded that “as long as North-South problems continue as the central theme in global forums, the US policy towards the UN has little chance of being any more successful than its overall relations with the [Less-Developed Countries]”.⁶⁹

1.5: The Decline of ‘Third Worldism’

By the 1970s, major political and economic structural shifts had eroded the viability of a non-aligned ‘middle path’ between the capitalist and communist blocs.

Many of the leading players of Bandung and the NAM had gravitated geopolitically to either pole: the Sino-Soviet split of the 1960s paved the way for Sino-American rapprochement in the 1970s; Egypt’s Anwar Sadat reversed his predecessor Nasser’s Soviet preference, favouring instead a strategic partnership with the US; and Suharto’s staunch anti-communist military dictatorship placed Indonesia firmly in the Western camp. Meanwhile, Vietnam, Laos and Cambodia all became communist states by 1976.

On the economic front, a growing number of states entered the

65. Bertrand Russell, quoted in Andrew and Mitrokhin, *The World Was Going our Way*, 67.

66. Ivan Potekhin, *Problems of Economic Independence of African Countries*, (Moscow: Academy of Sciences, 1962), 14-15.

67. Garavini, *After Empires*, 92.

68. Central Intelligence Agency, *The United States Has An Opportunity to Move Away From The Highly Polemic “North-South” Dialogue Toward a More Realistic Effort to Assist Third World Countries*, released 2 November 2007, 2 accessed via [link](#).

69. Central Intelligence Agency, *The United Nations: Problems and Potential*, released 7 March 2007, 12, accessed via [link](#).

capitalist world system. The rapid rise of certain developing countries – namely first and second wave 'Asian Miracle' economies – fractured the 'Third World' bloc along economic lines. Related to this, the OPEC 1973–1974 embargo devastated oil-importing developing countries, creating balance of payments crises, thereby forcing them to turn to loans from international institutions such as the IMF.⁷⁰ In return for this assistance, lenders demanded that recipients implement structural adjustment policies, imposing orthodox economic reform and putting them on track towards integration into the global capitalist system. These *geopolitical and economic* trends eroded the fault lines which had previously distinguished the 'Third World' from the two Cold War blocs.

In place of these previous borderlines, the G77 became infused with an increasingly anticolonial and Marxist activism. By 1974, the decolonisation process had produced a bloc of 96 countries which amounted to an effective veto on UN General Assembly resolutions.⁷¹ These states increasingly flexed their muscles on a diverse array of issues including apartheid, decolonisation, economic assistance, and trade relations.

This crystallising political solidarity on the international stage combined with a potent force gathering within Western society: the anti-Vietnam War movement. Before Vietnam, anti-colonialism and Marxism had largely been the reserve of fringe academic and intellectual circles in the West, despite the cultural cache of French intellectual support for the FLN during the Algerian War. Vietnam brought these movements into the mainstream of Western political debate. At a moment when students at Berkley were chanting "Western civilisation has got to go", the American press began publishing more content related to anti-imperialism than on any other social, economic or political subject.⁷² This confluence of external and domestic pressures re-wrote the model for interpreting global dynamics by replacing the tripartite 'Third World' system with a new bifurcated model: that of perceived Western politico-economic subjugation of 'the Rest'.

1.6: 'Global Southism'

It is perhaps unsurprising that the term 'Global South' was first coined in this politically tumultuous environment by a champion of the anti-Vietnam War movement, Carl Oglesby. Oglesby's 1969 essay "Vietnamism has failed... The revolution can only be mauled, not defeated" drew from Antonio Gramsci's depiction of a structurally unequal Italy – divided between the 'wealthy' north and 'poor' south – to argue that global history too was governed by "the north's dominance over the global south", which had produced "an intolerable social order."⁷³ For Oglesby, Vietnam and the Cold War struggle were simply subplots of a wider tale of enduring Western subjugation of the rest of the world. This framing thus collapsed the trifurcated 'Third World' narrative into a bipolar model – one which pits the privileged, domineering developed states (located loosely in the northern hemisphere) against underprivileged, stifled states (located loosely in the southern hemisphere).

70. WHO, IRIS: Crisis, Challenges and Opportunities (1970–1980), 179–181.

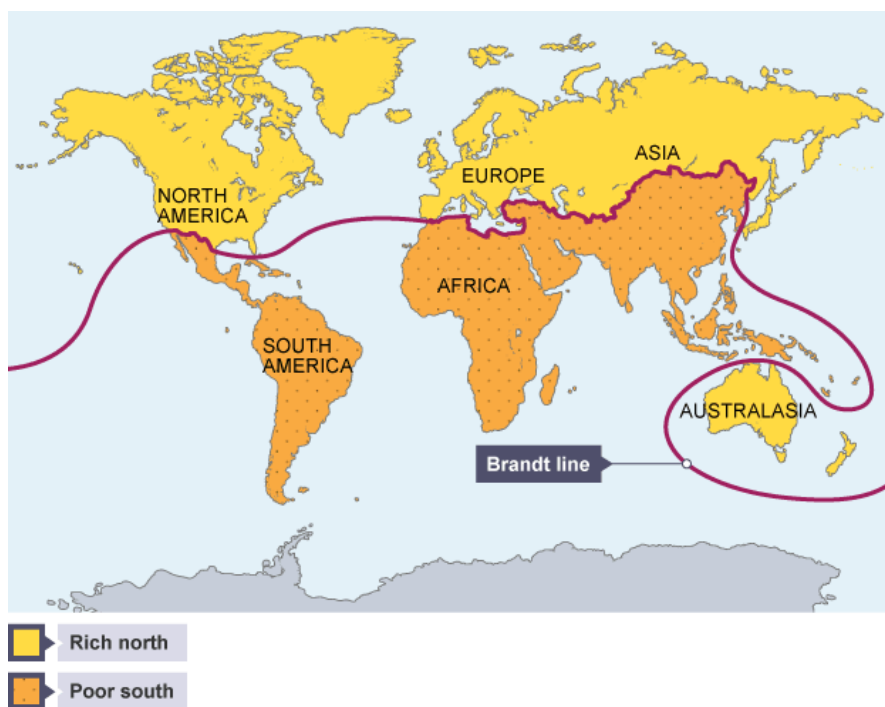
71. CIA, The United Nations: Problems and Potential, 7 March 2007, CIA-RDP79R01099A001500160005-0, 6.

72. Bill Warren, *Imperialism: Pioneer of Capitalism*, ed. John Sender, (London: Verso, 1980), 2.

73. Carl Oglesby, Vietnamism has failed... The revolution can only be mauled, not defeated", *Commonweal*, 1969, 90.

It would take some years for Oglesby's *bon mot* to appear in the echelons of international academic and policymaking circles. This moment came in 1977, when former West German Chancellor turned Chairman of the World Bank's Independent Commission on International Development, Willy Brandt, remarked that "cooperation between North and South is critical for the future of world peace."⁷⁴ By borrowing the Western-critical phraseology of a staunch activist from an ideologically febrile period, Brandt perhaps unwittingly tapped into and promulgated a particularly loaded political narrative, rather than formulating a development programme grounded in contemporary economic fact. Although the stated ambition of his 1980 Brandt Report – published upon the completion of the commission's inquiry – may have been to channel the spirit of *Südpolitik* "to reconcile at least parts of the North-South economic confrontation",⁷⁵ in truth Brandt echoed Oglesby's transfusion of geographical categories with cultural, historical, political and economic meaning.

THE 'BRANDT LINE' AND THE NORTH-SOUTH DIVIDE



The Original Brandt Line: [Source](#)

Brandt's cartographic distinction between 'North' and 'South' was not based on hard geography, but on a subjective interpretation of the history of colonialism and groupings by the post-1945 world order. The 'Brandt Line', as it later became known, has little to do with the actual hemispherical 'north' and 'south'. The Line runs far below the equator, and includes countries such as Japan, Australia and New Zealand in the 'North', in effect bifurcating the world along the lines of the US-led liberal order. Brandt's paradigm diverged from the idea of 'Third

74. Willy Brandt, "Opening address by Willy Brandt, Chairman of the Independent Commission on International Development, Issues at Gymnich Castle, World Bank, 9 December 1977, 3, [link](#).

75. Ibid., 9. *Südpolitik* is a derivative form of *Neue Ostpolitik* ("new eastern policy"), the diplomatic endeavour to normalise relations between West Germany and East Germany, spearheaded by Brandt's SDP party from the late 1960s. Brandt coined *Südpolitik* in his 1977 speech (see footnote 72) to borrow the tenets of *Ostpolitik* "to reconcile at least parts of the North-South economic confrontation".

Worldism', meant to be a 'middle path' for those seeking to avoid the Cold War's capitalist or communist blocs, instead creating two synthetic groupings: the West and 'the Rest'. Nevertheless, the Brandt Line retains the distinction between capitalist liberal states. This makes the 'Global South' the latest iteration of a lineage of developmentalist categories, which have all carried the *Zeitgeist* of 20th century postcolonialism and Marxist critiques of the global order. In rehashing older developed-developing binaries, the 'North-South' paradigm essentially ignored the Cold War context entirely; indeed, no representatives of Communist nations were invited to partake in the Commission.⁷⁶

In a sense, what Brandt wrought was 'Third Worldism' without its geopolitical sensitivity, as well as a regression from Wallerstein's sophisticated three-part structural analysis back to a simplistic binary framework. Brandt's 'North-South' paradigm reverted to sweeping generalisations which, predictably, resulted in hodgepodes of states assembled around loose commonalities.

Arguably, the most coherent defence of the 'Global South' is that offered by Nikita Sud and Diego Sánchez-Ancochea – two professors at the University of Oxford's Department of International Development. Their definition – which forms the ideological premise of the department's academic work – is based upon four somewhat abstract characteristics which the 'Global South' community supposedly shares: territorial, relational, structural, and political:⁷⁷

- **Territorial:** the 'South' comprises the postcolonial world – predominantly Asia, Africa and Central and South America – which has historically been subject to 'otherment' by the 'North'.
- **Relational:** As the 'South' has been 'othered' by the 'North', it has coalesced around shared experiences of imperial, colonial and economic domination.
- **Structural:** The lasting impact of this subjugation is a 'Southern' epidemic of underdevelopment, financial dependence and technological deprivation which, as highlighted by 'Southern' authors, is structurally embedded in the global order.
- **Political:** In order to subvert this systemic disadvantage, the countries of the 'South' have attempted to foster a 'Southern' solidarity, which drives proliferating political initiatives tasked broadly with redistributing political and economic power in the global system.

According to the authors, the first two properties are intrinsically 'negative', in that they were imposed on the 'South' via systematic oppression by the 'North'. The latter two, on the other hand, are 'positive', as they are driven by the 'South' "talking back" and petitioning for a restructuring of the global order.⁷⁸ Yet the authors concede that the potency of the territorial and relational characteristics has diminished, as economic divergence within the 'South' has increased.⁷⁹ Their advocacy

77. Nikita Sud and Diego Sánchez-Ancochea, *Southern Discomfort: Interrogating the Category of the Global South*, *Development and Change*, 2022 53 (6), 123.

78. *Ibid.*, 1143.

79. *Ibid.*, 1142.

76. Commission members included representatives of Kuwait, Columbia, Upper Volta, Chile, USA, UK, Tanzania, India, Malaysia, Indonesia, Japan, Canada, Sweden, France, Guyana and Algeria. The Brandt Report: A Summary, *STWR*, 31 January 2006, [link](#).

of the continual relevance and usage of the paradigm is therefore based on the 'Southern' narratives which "emphasise a 'Southern spirit' united against (post)colonial domination."⁸⁰ According to Sud and Sánchez Ancochea, "the position of countries and constituencies within the South is not fixed",⁸¹ but "like other empty signifiers, the South is filled with meaning by those who occupy and engage with it."⁸² Even two of the most articulate and effective proponents of the 'Global South', then, implicitly concede that the function of the term is not to reflect objective reality, but to offer subjective reflections on history and modern global dynamics.

The issue with applying the 'Global South' framework as a meaningful paradigm for understanding and making foreign policy is exactly this: a policymaker must understand the dynamics of foreign policy *as they are*, as opposed to *as a projection of abstract self-identity*. Self-identity and shared principles can certainly influence state behaviour – there is much to be said for the constructivist school of international relations – but history illustrates time and again that material interests provide the main guiding principle. As we shall see, the present is no different.

80. Ibid., 1139.

81. Ibid., 1126.

82. Ibid., 1125.

Chapter II: The Economic Illiteracy of the 'Global South'

For the 'Global North-Global South' binary to be credible on any economic basis, it must reflect an identifiable structural division between the two groups. This is simply not the case. Instead, the 'Global South' has experienced enormously variegated development trajectories over the past 30 years, bringing select members on to an equal – or in some cases, higher – economic footing with much of the 'Global North'. The binary model also fails to encapsulate other salient global economic trends, including sclerotic growth in the 'Global North', rising domestic inequality, and the emergence of 'South-South' financing.

2.1: Economic Fragmentation of the 'Global South'

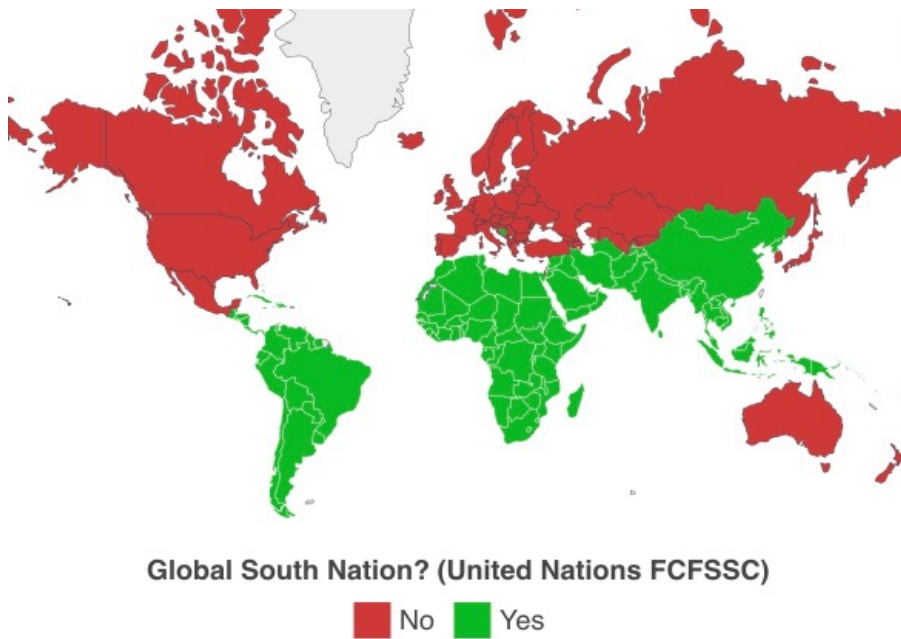
Economic trends defy the 'Global North-Global South' model, rendering it immensely flawed. Firstly, there has been an aggregate convergence in economic size between an increasing number of 'Southern' countries and the 'Global North' over the last five decades.⁸³ Secondly, the notional economic binary is further discredited by growing variance within the 'Global South' itself, a trend which the development economist Paul Collier has termed the "bifurcation between 'emerging market economies'... and 'the bottom billion'",⁸⁴ referring to the poorest 60 countries which have fallen further behind the OECD. This important distinction reveals a crucial limitation of the 'Global North-Global South' framework as it seeks to reflect the contemporary global economic order: its complete disregard for the rise of India, China, Brazil, the Asian Tigers, and the oil-rich Gulf states, *inter alia*. Thirdly, one of the central premises of the North-South divide – that the US's dominance of international lending leaves developing countries at Washington's mercy – has been overtaken by reality. In 2020, renminbi-denominated international loans surpassed those made in US dollars, as China overtook the US as the developing world's largest benefactor for the first time.⁸⁵ Fourthly, the 'Global North-Global South' paradigm is entirely incapable of reflecting nor explaining the global rise in intra-state inequality.

Several visually-expressed metrics of economic transformation help us unpack and unravel the notion of a 'Global South'.

83. Charities Aid Foundation, *Laying the Groundwork for Growing Giving*, August 2017, 10-11.

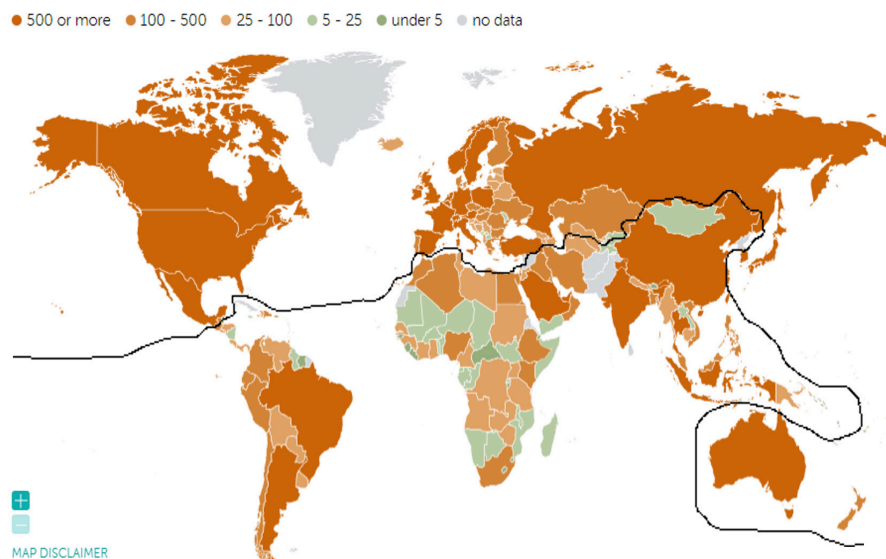
84. Paul Collier, *Development economics in retrospect and prospect*, *Oxford Review of Economic Policy*, 2015 31(2), 243.

85. Rachel Savage and Clare Baldwin, *China lent \$1.34tn in 2000-2021, focus shifts from Belt and Road to rescues finance-report*, *Reuters*, 6 November 2023, [link](#).



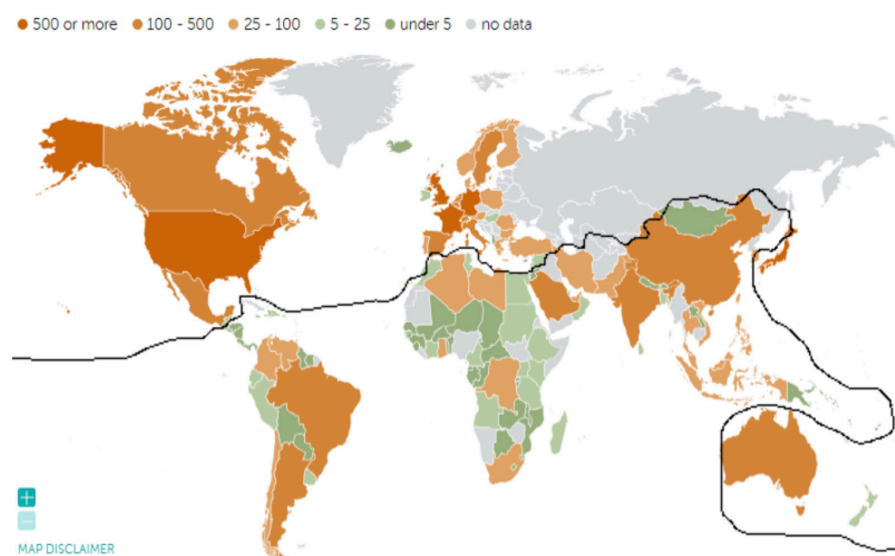
The UN's Current 'Global North-Global South' Division. [Source](#)

The first map shows the current categorisation of the 'Global North' and 'Global South', as per the UN Office for South-South Cooperation (FCFSSC). As mentioned above, this combines the original Brandt Line's division with subsequent tweaks, including placing South Korea and Israel in the 'Global North', and Bosnia and Herzegovina in the 'Global South'.



2024 Map by GDP, current prices (US\$bn). UN 'Global North-Global South' division line in black. [Source](#)

The second heat map shows GDP in US dollars, as per IMF data. A first glance shows that, whilst the 'Global North' is relatively homogenous in terms of enjoying top or second band status, the 'Global South' demonstrates significant heterogeneity. As the following map shows, Southern fragmentation has emerged pointedly since 1980, when the Brandt Commission first proposed the framework.



1980 Map by GDP, current prices (US\$bn). UN 'Global North-Global South' division line in black. [Source](#)

As illustrated, there has always been a moderate degree of GDP variance across the 'Southern' bloc – even during its formation in 1980. However, Collier's conclusion that it represented a "single aggregate" at the time is broadly defensible.⁸⁶ More consequential is his identification of a "remarkable...convergence between many 'developing' countries and the OECD" in the intervening decades,⁸⁷ as broad swathes of Southeast Asia, Argentina, Brazil, the oil-rich Gulf, Oceania and North Africa all joined the Northern countries in the top two GDP brackets.

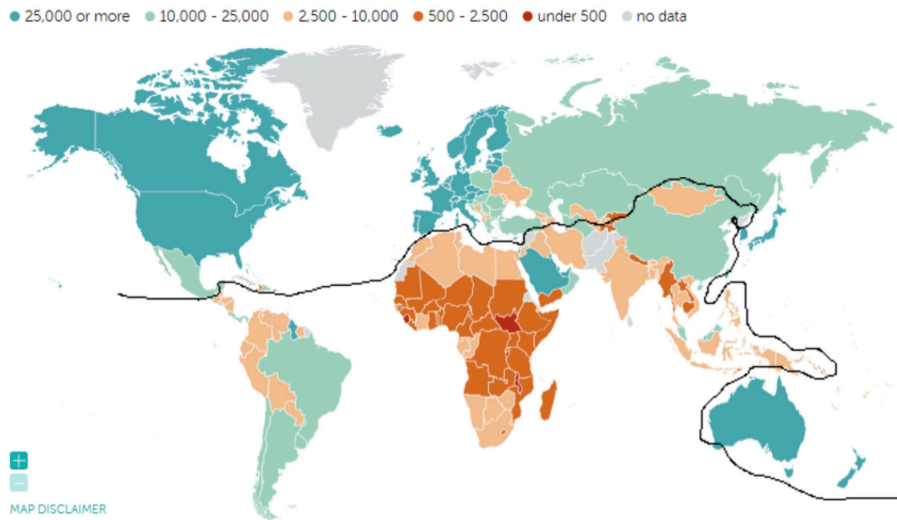
These tectonic shifts have transformed the 'Global North-Global South' hierarchy beyond recognition. Today, eight of the world's twenty richest countries (by GDP) are members the 'Global South': China is second; India is fifth; Brazil is ninth; Russia— a self-proclaimed 'Southern' state, but an indisputable part of the cartographic north and an explicitly imperial power—is eleventh, with Mexico coming in twelfth. Indonesia is sixteenth and Turkey is seventeenth. On the metric of GDP per capita, the division becomes even more bizarre:⁸⁸ Saudi Arabia and Kuwait have a higher GDP per capita than Portugal. Puerto Rico and the Bahamas have a higher GDP per capita than Spain. The Seychelles have a higher GDP per capita than Romania. Despite over 25% of their populations being at risk of poverty or social exclusion, Bulgaria, Greece, and Latvia are all considered part of

86. Collier, Development economics in retrospect and prospect, *Oxford Review of Economic Policy*, 2015 31(2), 243.

87. Ibid.

88. Data from World Bank Group, GDP per capita (current US\$), [link](#).

the 'Global North.'⁸⁹ The more one interrogates the distinction, the less it passes muster as an economic model.



2024 Map by GDP per capita, current prices (US\$). UN 'Global North-Global South' division line in black. [Source](#)

GDP per capita reveals the disparity of individual wealth between the 'Global North' and 'Global South'. But it also shows the difference within the 'Southern' community itself. Sub-Saharan Africa remains far below the 'Global North' in both GDP and GDP per capita terms. Populous Southeast Asian states, however, may have risen into the upper GDP bands, but remain comparatively much poorer than the 'Global North' in GDP per capita terms. China, Brazil and Argentina on the other hand, have caught up with the 'Global North' on both counts. A story therefore emerges of growing divergence in economic trajectories across the 'Global South', dispelling the notion of a homogenous bloc uniquely disadvantaged in global affairs.

This snapshot comparison corroborates the systematic economic analysis of Branko Milanovic, former lead researcher at the World Bank, who demonstrates that North-South inequality (once adjusted by population size) fell as a proportion of global inequality – even amidst the “development collapses” of the 1980s and 1980s – periods routinely pointed to as evidence of systemic inequities between the North and South.⁹⁰ As Milanovic shows, the driving current behind this fundamental shift was the remarkable growth of select 'Southern' countries, which offset rising inequality between other group members and the 'Global North'.⁹¹

A critical sub-plot of the recent global development story therefore emerges: that of the *variegated economic trajectories* of the 'Global South'. As Nicholas Lees puts it – a political theorist who supports the enduring pertinence of the 'Global North-Global South' paradigm:

89. Eurostat, Living conditions in Europe – poverty and social exclusion, June 2023, [link](#).

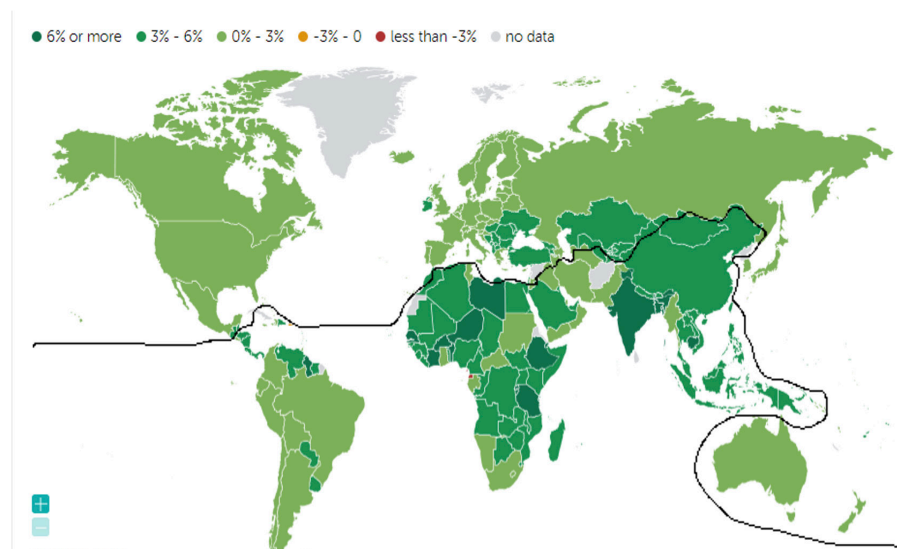
90. Nikita Sud and Diego Sánchez-Ancochea, Southern Discomfort: Interrogating the Category of the Global South, *Development and Change*, 2022 53 (6), 1136.

91. Branko Milanovic, *World Apart: Measuring International and Global Inequality*, (Woodstock: Princeton University Press, 2005).

“If we imagine the states of the world as a deck of cards, ordered in terms of income, with states of the North and the Global South represented by cards of different suits, then it is as if the cards have been shuffled somewhat within their suits, but the overall deck has not been shuffled at all. The most significant trend has been a reordering of the rankings within the Global South, with industrialising Asian states moving to the top and unstable states moving to the very bottom.”⁹²

We have already witnessed how Lees’ assertion – that the ‘Northern-Southern’ hierarchy remains unchanged – runs contrary to contemporary economic rankings. Furthermore, in the italicised clause above he attempts to discard the variegated economic growth trajectories of ‘Southern’ as a moot point. But surely any serious attempt to model the international economic order should reflect such a significant development? A paradigm which encapsulates only half of the global economic picture over the last four decades is surely of limited utility.

Indeed, it is the exceptional growth trajectories of select ‘Southern’ states – and the wider economic and geopolitical implications of this development – which constitute the major lacuna in the ‘Global South’ model. The main engine of ‘Southern’ growth in this regard is the BRICS+ group.⁹³ The bloc of nine now accounts for a truly ‘Northern’ share of nominal global GDP (29%): far higher than the EU’s 19%.⁹⁴ The other side of this story is the bloc’s staggering growth rate; by Goldman Sachs’ estimate, average BRICS+ GDP growth is forecast at 189% until 2050, compared to 50% for the G7.⁹⁵ As a result, the investment bank forecasts that total BRICS+ GDP will exceed that of the G7 by 2050. The gargantuan scale of this leap is made all the more clear when one considers how, in 1980, the original BRICS countries (excluding Soviet Russia) accounted for just 10% of global GDP.⁹⁶



2024 Map by real GDP growth, annual change. UN ‘Global North-Global South’ division line in black. [Source](#)

92. Nicholas Lees, *The Brandt Line after forty years: The more North-South relations change, the more they stay the same?*, *Review of International Studies*, 2021 47 (1), 98, italics added by author.

93. Now including new additions: the UAE, Egypt, Iran and Ethiopia. Saudi Arabia is still considering its membership as of writing

94. EU Parliament, *Expansion of BRICS: A quest for greater global influence?*, 15 March 2024, 1.

95. Kevin Daly and Tadas Gedminas, *The Path to 2075 – Slower Global Growth, But Convergence Remains Intact*, *Goldman Sachs*, 6 December 2022, 6, [link](#).

96. Kishore Mahbubani, *Measuring the power of the Global South*, *Chatham House*, 2 February 2024, [link](#).

With the expansion of BRICS+ last February, two major oil producing countries have entered the bloc (with Saudi Arabia still considering its membership offer). Whilst Iran has suffered from sustained international ostracisation and sanctions, Saudi Arabia and the UAE have enjoyed decades of strong economic growth on the back of the oil boom. Alongside their oil-rich Gulf neighbours Qatar and Kuwait, these states have undergone transformational development entirely unique from other members of the 'Global South'. A simple indication is their GDP per capita: Saudi Arabia \$30,500, Kuwait \$41,000, the UAE \$53,000, and Qatar \$87,600.⁹⁷ All but one of these surpassed the average GDP per capita of the EU, which was €40,800 at the end of 2023.⁹⁸

BRICS+ – CHAMPION OF THE GLOBAL SOUTH

BRICS has evolved considerably from its original function as an advertising slogan for attracting foreign investment. In 2006, at the instigation of Russian President Vladimir Putin, the first BRICS Ministerial Meeting met on the margins of a UN General Assembly Session. In the intervening years, the group – now referred to as BRICS+ -- has come to constitute a highly active geopolitical bloc of nine states (perhaps soon to be ten, pending Saudi Arabia), whose broad agenda rests on three thematic pillars: politics and security, economics and finance, and cultural and people-to-people cooperation.⁹⁹

The natural affinity between BRICS+ and the 'Global South', both in terms of membership cross-over and mutual aspirations for multipolarity, has inevitably resulted in the former becoming a vehicle for the latter.

During last year's BRICS Summit in South Africa, the organisers reported that over 40 'Southern' states had applied to join.¹⁰⁰ At time of writing, another emerging Asian economic power, Malaysia, has just announced its desire to apply.¹⁰¹ In an era of growing cynicism towards the Western-led international order, and desires to undermine existing multilateral institutions, BRICS increasingly resembles an international lobbying group. The main website reads like an advertisement for new members: "BRICS countries are influential members of leading international organisations and agencies, including the UN, the G20, the Non-Aligned Movement and the Group of 77." It writes that "the growing economic might of BRICS countries, their significance as one of the main driving forces of global economic development, their substantial population and abundant natural resources form the foundation of their influence on the international scene."¹⁰²

It is no coincidence that these ambitions and motivations are indiscernible from those of the 'Global South'. Russia and China – as original BRICS members and the most vocal advocates of the 'Global South' – increasingly see the synergistic potential of aligning their revisionist agendas under one broad umbrella. In this vein, in an official pamphlet issued in South African media on the eve of last year's summit, Russian Foreign Minister Sergei Lavrov urged the organisation to

97. The World Bank, GDP per capita.

98. World Bank, GDP per capita (current US\$), [link](#).

99. Joint Statement of the BRICS Ministers of Foreign Affairs and International Relations, Cape Town, South Africa, 1 June 2023, published on *The Ministry of Foreign Affairs of the Russian Federation*, 2 June 2023, [link](#).

100. What is BRICS, which countries want to join and why?, 22 August 2023, *Reuters*, [link](#).

101. Malaysia submits BRICS membership application, *Africa News*, 29 July 2024, [link](#).

102. InfoBRICS, History of BRICS, [link](#).

“strengthen the solidarity of the Global South and Global East and become one of the pillars of a new, more just polycentric world order.”¹⁰³ A South African government representative noted that the organisation now represents “a collective of the Global South”, and that “taking care of the interests of the Global South” is a “core value” of the initiative.¹⁰⁴ Leaders from across Africa were duly invited to last year’s summit.

These are not purely altruistic endeavours, but are geared towards obtaining influence and leverage amidst geopolitical competition with the West. Whether it be the New Development Bank (also known as the BRICS Bank) launched in 2015, or frequent chatter about a new BRICS currency (proposed by Brazilian President Luiz Inácio Lula da Silva last year), the group seeks means of fragmenting the incumbent economic and financial global systems, particularly in the context of Western sanctions on several of its members. As these models afford significant advantages to the US and its aligned partners – including the UK – efforts to replace them amount to strategic risks.

Furthermore, as BRICS grows, the larger powers will likely intensify the demands for political alignment – the exact form of leverage exercised by the US that has provoked the very grievances driving the movement. It is noteworthy that, in the pamphlet published before last year’s summit, Russia’s war on Ukraine received only three mentions in neutral tone. Moscow was not criticised, but only the “West’s unilateral sanctions [which] have battered economies.”¹⁰⁵ Last June, Russian media agency TASS made a point of reporting that a number of BRICS+ members (Brazil, India, the UAE, Saudi Arabia, and South Africa) chose not to send their heads of state to the peace conference held in Switzerland.¹⁰⁶ With the next BRICS summit taking place in Russia this month, the UK should keep an eye out for evidence that Russia is nudging the group towards a more overt stance on the war.

Each member of BRICS+ possesses easily identifiable interests for participating in the forum, which run deeper than commitment to an egalitarian world order. Sometimes these align, such as the efforts by sanctioned BRICS+ economies to circumvent Western financial systems, and at others they diverge, as with wider Indian-Chinese and Iranian-Saudi/UAE rivalries. It is as important for the UK and its allies to identify and exploit these fault lines, as it is to acknowledge where BRICS’ ‘Southern’ unity is robust enough to present a united body on the world stage.

The well-documented rise of powerful Gulf sovereign wealth funds has redefined the structural function of these states in the world economy. Whereas these states were previously limited to an ‘insulated’ role in the global economic system¹⁰⁷ – characterised by transactional ‘oil for weapons, services and goods’ relationships – they are now building vast equities in the global economy, notably in the investment-hungry ‘Global North’. With growing presence comes expanding influence, evident in

107. Hazem Beblawi and Giacomo Luciani (ed.), *The rentier state*, (London: Routledge, 1987), 4.

103. BRICS and Africa: Partnership for Mutually Accelerated Growth, Sustainable Development and Inclusive Multilateralism, *Ubuntu Magazine*, Issue 30, 2023, 19.

104. *Ibid.*, 12.

105. BRICS and Africa, *Ubuntu*, 2023, 60.

106. BRICS leaders not to attend conference on Ukraine in Switzerland, 14 June 2024, [link](#).

the mounting concerns across the West over unfettered Gulf investment and takeovers of domestic business.¹⁰⁸ Needless to say, this phenomenon was neither predicted nor explained by Brandt's 'Global North-Global South' framework.

It is not just in pure GDP and growth rate terms that the economies of these 'Southern' countries are patently distinct from other members of the bloc. Indeed, a growing corpus of developmental research, which offers granular analysis of wide-ranging dimensions of political economy – including governance, institutions and demographics – suggests that the most advanced 'developing' countries now function more like 'developed' ones, rather than their 'Southern' counterparts. This is the conclusion of Collier's compelling overview of the contributions to development studies of more recent schools of political economy, including new economic geography, quantitative empiricism, and new political economy.¹⁰⁹ In pointed critique of the 'Global North-Global South' paradigm, Collier's bottom-line is robust: "the bifurcation of the world into poor countries and rich ones is rapidly disappearing."¹¹⁰ Thus, "any categorisation which proposes to group China together with Liberia is clearly devoid of meaningful content."¹¹¹

THE DIGITAL SCRAMBLE FOR THE 'DEVELOPING WORLD'

The Fourth Industrial Revolution is re-writing global technological and digital systems. The pace of change is particularly intense in the developing world, where some countries are proving able to leapfrog more primitive technological phases towards digital modernity. Nigeria, for example, skipped the development of a national fixed-line telephone system, going straight to mobile.

The need to disseminate modern technology, and build digital data and infrastructure, at speed and scale has become a critical dimension of geopolitical competition. Major powers and technology conglomerates are involved in a scramble to provide the 'Global South' with subsea cables, data centres, and telecommunications infrastructure – and to accrue the economic and political benefits this provides.

China's Digital Silk Road, a subsidiary component of the BRI, is linking Beijing to 140 countries worldwide via cooperation in the digital space, including infrastructure projects. The CCP has invested over \$8bn in the internet infrastructure of a slate of African countries (Angola, Nigeria, Zimbabwe, Ethiopia and Zambia) and,¹¹² as Policy Exchange detailed in its report, *From space to seabed*, has already invested billions in a new undersea fibre-optic cable network in the Indo-Pacific region.¹¹³ This is a competitive landscape, as the G7 Partnership for Global Infrastructure and Investment (PGII), and EU's Global Gateway, represent the West's response to Chinese efforts. The race is not limited to state actors, but major tech companies are vying for market share. By 2019, Huawei Marine had captured one fifth of the global undersea cables market,¹¹⁴ whilst Google and Meta are both heavy investors in digital infrastructure

108. Oxford Analytica, Gulf states: Western investment drive will accelerate, *Expert Briefings*, 2024, [link](#).

109. Collier, Development economics in retrospect and prospect, *Oxford Review of Economic Policy*, 2015 31(2), 242-258.

110. *Ibid.*, 256.

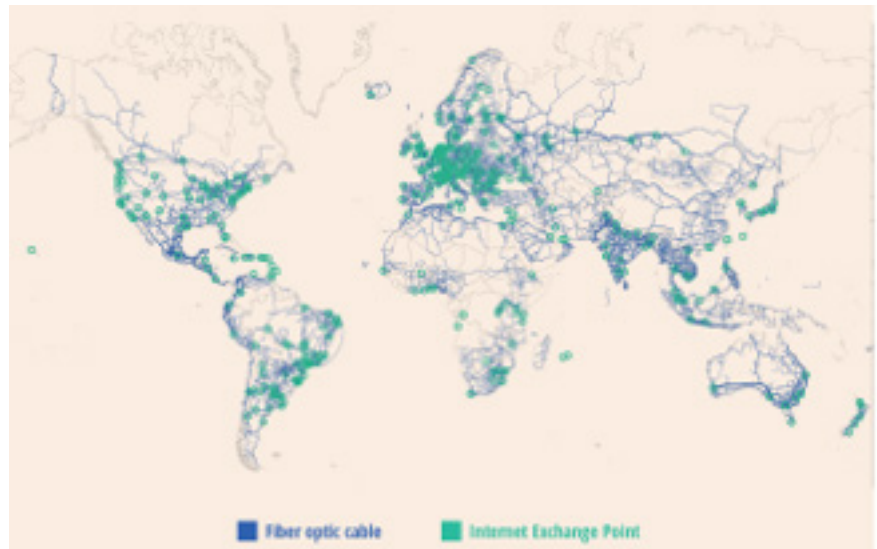
111. *Ibid.*, 243.

112. Maria, China's Digital Silk Road: Outlines And Implications for Europe, *International Centre for Defence and Security*, February 2024, 1.

113. Marcus Solarz Hendriks and Harry Halem, *From space to seabed: Protecting the UK's undersea cables from hostile actors*, Policy Exchange, 2024. 36-37.

114. Anna Gross et al., How the US is pushing China out of the internet's plumbing, *FT*, 13 June 2023, [link](#).

in Africa and Asia. Just as Facebook has backed the 2Africa cable project, which will have landings in 15 African states, Huawei's 25 cloud infrastructure and data centre projects in the continent pose a real risk of data market domination.¹¹⁵



Map of internet connectivity. Data Source: [ITU UCT](#). Graphic Source: [TNI](#)

This is about more than commercial opportunities, but is also a contest for setting the norms, and establishing the access, to exert influence over global digital governance. On the one hand, liberal states wish to export open and democratised digital practices, such as through the EU's EU-AU Digital Transformation Partnership. The US leverages its global preponderance to create favourable regulatory and data governance environments for its tech giants. India is now trying to deliver India Stack in Africa— a digital public infrastructure initiative credited for tackling corruption and granting citizens easier access to health, education, and banking systems across India. This aligns with the West's digital liberalising agenda, leading the UN to note how India Stack “can accelerate global economic growth, support the transition to sustainable and green economies, and grow accessibility and public trust in institutions.”¹¹⁶

On the other hand, illiberal powers can appeal to the more undemocratic predilections of some regional leaders with oppressive digital offerings. Beijing has signed a host of digital partnerships in Africa, and is seeking to export its 'Great Firewall' model of internet censorship. Two examples are demonstrative: the Chinese telecommunications conglomerate ZTE has delivered censorship-enabled digital infrastructure to the Ethiopian government to surveil activists and journalists.¹¹⁷ As of three years ago, Huawei had provided 70% of Africa's 4G network infrastructure, and is the primary technical patron of smart city programmes in Zimbabwe, Kenya and Uganda.¹¹⁸ The CCP provides Chinese tech champions such

115. Jevans Nyabiage, African nations continue to put trust in Huawei for data management, *South China Morning Post*, 28 June 2021, [link](#).

116. UNDP, Accelerating the SDGs Through Digital Public Infrastructure, August 2023, 3.

117. Lynsey Chutel, China is exporting facial recognition software to Africa, expanding its vast database, *Quartz*, 25 May 2018, [link](#).

118. Veneranda Langa, Rise of Chinese surveillance tech in Africa: Development or espionage, *The Africa Report*, 11 July 2024, [link](#).

as Tencent and Baidu with overseas market opportunities through deals reached with other governments via the BRI.¹¹⁹ As Policy Exchange has previously noted in *From space to seabed*, control of digital plumbing enables access—for either monitoring or tampering purposes—to data in transit.¹²⁰



Map of global data centers. [Source](#)

Data storage, digital infrastructure, and internet access are all enablers of quotidian social economic activity. They are the essential foundations of 21st century life, but each comes with clear political import. This includes the geostrategic allegiances and dependences fostered through interstate partnership, the 'knowledge is power' logic of data access and possession, and even extends to affording 'neutral' market providers geopolitical influence. Consider, for example, the EU's investigation into Meta's failure to remove the Kremlin's propaganda on Facebook.¹²¹

That said, whilst the digital landscape may appear to be another case of external powers circling over the developing world, the multi-option landscape affords the latter a higher degree of agency than in the past. It is in the interests of citizens in developing states that Western governments focus on presenting an alternative avenue to the exporters of oppressive digital practices.

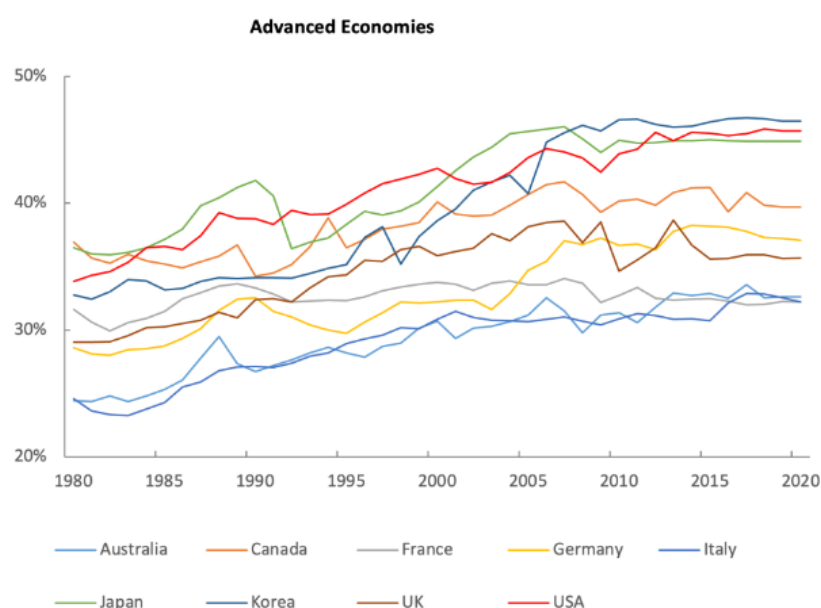
2.2: Growing Intra-State Inequality

The economic rationale of the 'Global North-Global South' paradigm also breaks down when we consider the global trend of rising domestic inequality. This may seem a glib point, but given that the growing gap between the rich and poor is now a major driver of domestic political forces across much of the 'Global North', it raises serious questions over the merit of employing an overarching framework which fails to address this trend.

119. Rohinton P. Medhora and Oliver Letwin, Managing Rivalry in the Digital Era through Peaceful Competition, *Centre for International Governance Innovation*, 14 February 2022, <https://www.cigionline.org/articles/managing-rivalry-in-the-digital-era-through-peaceful-competition/>

120. Marcus Solarz Hendriks and Harry Halem, *From space to seabed: Protecting the UK's undersea cables from hostile actors*, 19 February 2024.

121. Liv McMahon, Meta faces EU probe over Russian disinformation, *BBC*, 30 April 2024, [link](#).



Rising income share of richest 10%, G7 plus Australia and South Korea. [Source](#)

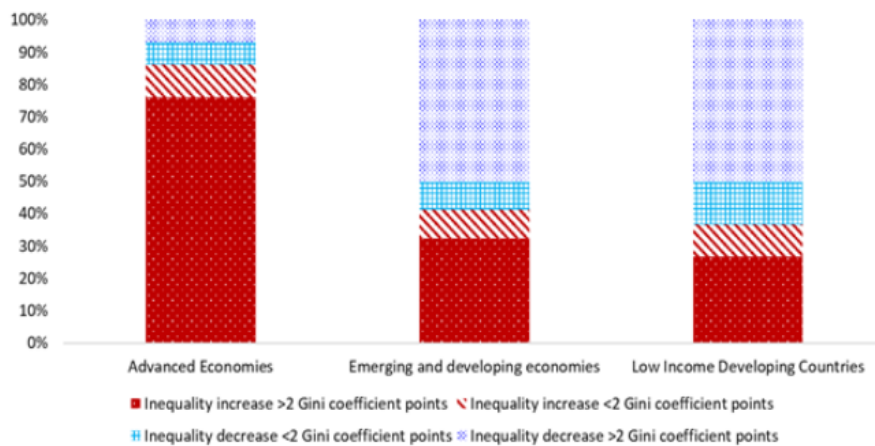
Income inequality across Europe and the US has rapidly grown since the 1980s. The reasons for this are multiplex and far beyond the parameters of this paper. However, de-industrialisation catalysed by globalisation is an especially profound factor to present analysis. Extensive research suggests that international trade has caused a widening divergence along multiple divides, including socio-economic class, economic sectors, and regions.¹²² Thus, as cheaper goods started flowing in from proliferating foreign markets and out-competing domestic manufacturers, developed world workers have fallen foul of inexorable structural adjustments in the global economy. As mature economies suffered industrial decline, they shifted emphasis towards booming services. Services-based economies inherently offer less employment than manufacturing – and require higher levels of education. The upshot is that a shrinking proportion of populations have staked out a growing slice of the economic pie. In Western Europe and the U.S. in particular, the job market has experienced a hollowing out of traditional middle-class jobs. This phenomenon, known as job polarisation, has pushed great numbers of people into increasingly depressed income and wealth brackets, whilst the rich have enjoyed sustained enrichment, ultimately making intra-country inequality more acute.¹²³

Occurring at the same time as many developing countries have experienced rapid economic growth, the overriding trend since the 1990s has therefore been one of disproportionately accelerating intra-country inequality in the 'Global North'.¹²⁴

122. For example, see Andrew Hurrell and Ngaire Woods, *Globalisation and Inequality*, (London: Routledge, 2002); David Dorn and Peter Levell, *Trade and inequality in Europe and the US*, *Institute for Fiscal Studies*, 2021.

123. Maarten Goos and Alan Manning, *Lousy and Lovely Jobs: The Rising Polarisation of Work in Britain*, *The Review of Economics and Statistics*, 2007 89 (1), 118-133.

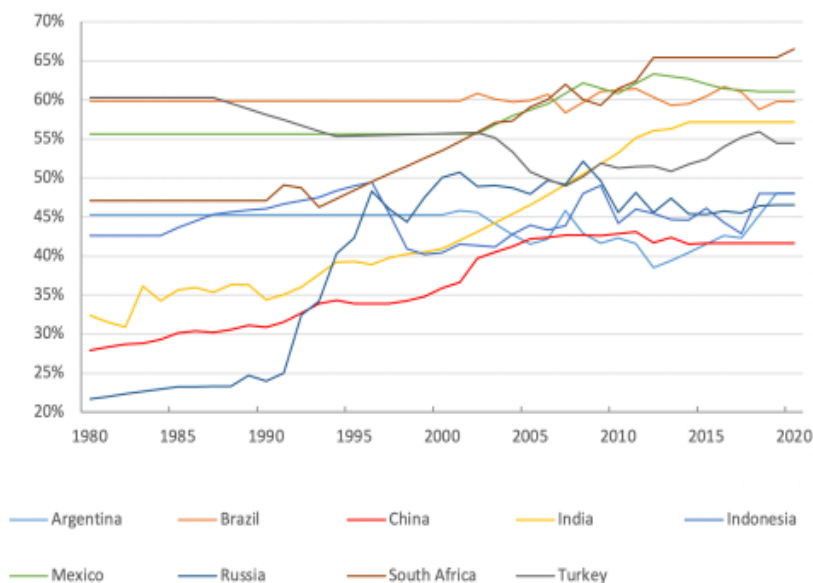
124. IMF, *Income Inequality*, [link](#).



Source: IMF, Fiscal Monitor, October 2017

[Source](#)

The story is more complex in the 'Global South', which attests once more to the redundancy of the category. As the following graph indicates, there is no identifiable pattern in bloc-wide intra-state inequality.



Rising income share of richest 10%, select emerging economies. [Source](#)

This may be illustrated by a comparison of China and India, the major 'Global South' economic success stories. Since 2000, China's key socio-economic trends have been a sharp reduction in poverty, and a slight (but growing) rise in inequality.¹²⁵ This reflects the disaggregation of social classes, as the emergence of a Chinese middle class has been accompanied

125. Sonali Jain-Chandra et al., Inequality in China – Trends, Drivers and Policy Remedies, IMF Working Paper, 2018, 3.

by a pace of enrichment for top earners which has outstripped that of the rest of society. Thus, whilst overall inequality has risen, the bottom half of society has experienced a five-fold average income growth since the 1980s, in contrast to a negative growth of 1% in the U.S.¹²⁶

Meanwhile, the wealthiest 1% of Indians currently possess the largest historical volume of national wealth (22.6% in income terms, and 40.1% in wealth terms).¹²⁷ Whilst this overall trend mirrors China, India has not yet experienced the emergence of a true middle class. In fact, the middle 40% of wealth owners in fact increased their share at a slower rate than the poorest 50% between 2014 and 2022.¹²⁸ The main explanation of this trend was the incredibly small portion of national wealth owned by the poorest Indians at the turn of the 21st century, which meant that the subsequent gains made by the top 10% could only cannibalise the share of the middle 40%. Thus, whereas China has been able to generate a veritable middle class – despite widening inequality between the poorest and richest – India has not yet experienced similar social class disaggregation.

This is of course merely a glimpse into global inequality trends, but it nonetheless suffices to present two key findings: the advanced economies of the 'Global North' are in the midst of a rise in intra-country inequality, driven largely by bloc-wide trends; whereas, across the 'Global South', inequality takes different forms, at varying rates, with distinct implications. These alternative stories could be taken as support for the notion of a dual track global economy, but they do not corroborate the narrative of a perennially structurally-disadvantaged 'Global South'.

2.3: The Rise of 'South-South' Financing

As India and China have risen in economic stature, a fundamental shift in interstate global capital flows has occurred: the rise of 'South-South' financing. This poses another structural challenge to the 'Global North-Global South' paradigm, given Brandt's emphasis on the role which Western-controlled international financial institutions play to perpetuate 'North-South' inequalities.¹²⁹ In addition to overriding the economic logic which underpins 'Global Southism', this new dynamic in capital flows unearths the competing geopolitical motivations of 'Southern' champions, China and India.

Chinese state-driven loans to the developing world began to soar at the turn of the 21st century, and China became the world's largest creditor in 2017.¹³⁰ At this point, Chinese state-owned creditors had accrued debts of 146 countries deemed 'emerging' or 'developing' by the UN, with the 50 most indebted seeing China's share of their external debt rising from 1% in 2005 to 30% in 2017.¹³¹

126. Thomas Piketty et al., The Rise of Wealth, Private Property, and Income Inequality in China, *American Economic Review*, 2019, 1.

127. Nitin Kumar Bharti et al., Income and Wealth Inequality in India, 1922-2023: The Rise of the Billionaire Raj, *World Inequality Lab*, March 2024, 5.

128. Ibid., 21.

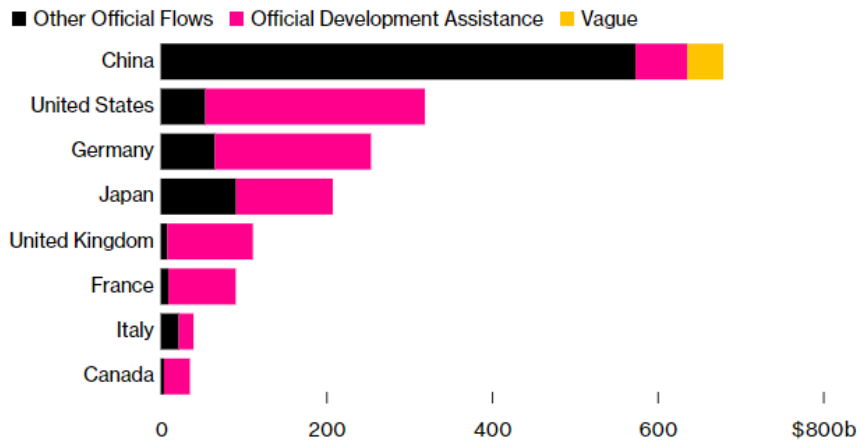
129. Nikita Sud and Diego Sánchez-Ancochea, Southern Discomfort: Interrogating the Category of the Global South, *Development and Change*, 2022 53 (6), 1137.

130. Sebastian Horn et al., China's overseas lending, *Journal of International Economics*, 7 October 2021 (133).

131. Ibid., 2.

China and Group of 7 Funding to Developing World

Financing provided during Belt & Road Initiative era from 2014 to 2021



Source: AidData

Note: Funds/financing reflect "stocks" of financial flows, also referred to as cumulative financial commitments; Constant USD 2021 billions

[Source](#)

This staggering increase in lending is the product of Beijing's "Going Global Strategy" (GGS), launched in 2000 in conjunction with its accession to the WTO.¹³² The initiative's fundamental objective is to expand Chinese influence globally through strengthening economic ties and, as a corollary, to rival the primacy of US-backed financial institutions and the dollar. This umbrella strategy therefore guides China's myriad overseas development investment instruments – ranging from the Belt and Road Initiative (BRI), to the Asian Infrastructure Investment Bank (AIIB), to China Development Bank – all of which target G77 countries to compete with Western influence in these regions.

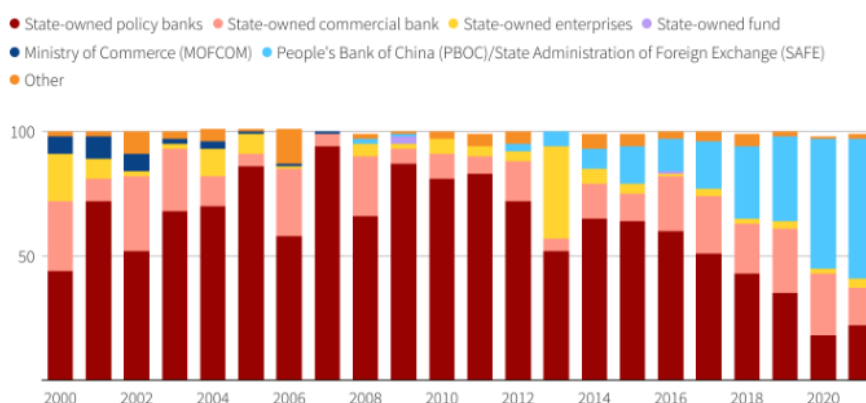
China's newfound position as the world's largest official debt collector has fundamentally altered the international finance landscape. As its loans to developing countries reached \$1.34tn between 2000 and 2021, the nature of Beijing's liabilities has changed and, as a consequence, so too has its strategy. BRI infrastructure project investment from Chinese policy banks accounted for over 50% of total Chinese financing in 2013-2014, but this form of lending started to fall thereafter. In its place, bailout lending from the People's Bank of China and State Administration of Foreign Exchange has risen, now standing at over half of total Chinese loans.¹³³

132. Heino Klinck, *The Strategic Implications of Chinese Companies Going Global*, *The Foreign Military Studies Office*, 2012, 5.

133. Rachel Savage and Clare Baldwin, *China lent \$1.34tn in 2000-2021, focus shifts from Belt and Road to rescue finance-report*, *Reuters*, 6 November 2023, [link](#).

China's overseas lending: from bridges to bailouts

Lending for infrastructure projects has shrunk as a proportion of China's overseas lending, while rescue loans have risen in recent years



[Source](#)

As a consequence, China and its renminbi have been pulled into the international debting orbit, partially supplanting a role historically reserved for the US. With this responsibility undoubtedly comes risk – evinced by the fact that Beijing has been forced to resort to managing repayment risk through foreign currency escrow accounts – but also mounting influence. Firstly, escrow account arrangements may afford Beijing debt seniority over repayments to multilateral development banks, potentially jeopardising the balance books of traditional providers in the instance of debt default.¹³⁴ Secondly, the destination of Chinese overseas lending has also shifted, with a reduction in African loan commitments and a quadrupling of those to Europe between 2018 and 2021.¹³⁵ The salient point to take from these developments is the emergence of China – a member of the 'Global South' – as a major player in complex international financing ecosystems.

More recently, India has entered the fray of 'South-South' lending. Indian overseas financing to developing countries is issued by two main institutions: the Ministry of External Affairs and Exim Bank. These government-financed agencies began to issue credit and other forms of developmental financing to the 'Global South' in earnest in 2007.¹³⁶ Unlike China's vast global footprint, however, New Delhi overwhelmingly prioritises Africa and Asia. As of last year, India was the second-largest issuer of credit to Africa (after China), with \$32bn going to 42 countries since 2013, and a further \$12bn in planned projects.¹³⁷

India's emergence as a major overseas financier is a function of its economic rise, but the specific targeting of its aid reveals another motivation: geopolitical rivalry with China for influence across the

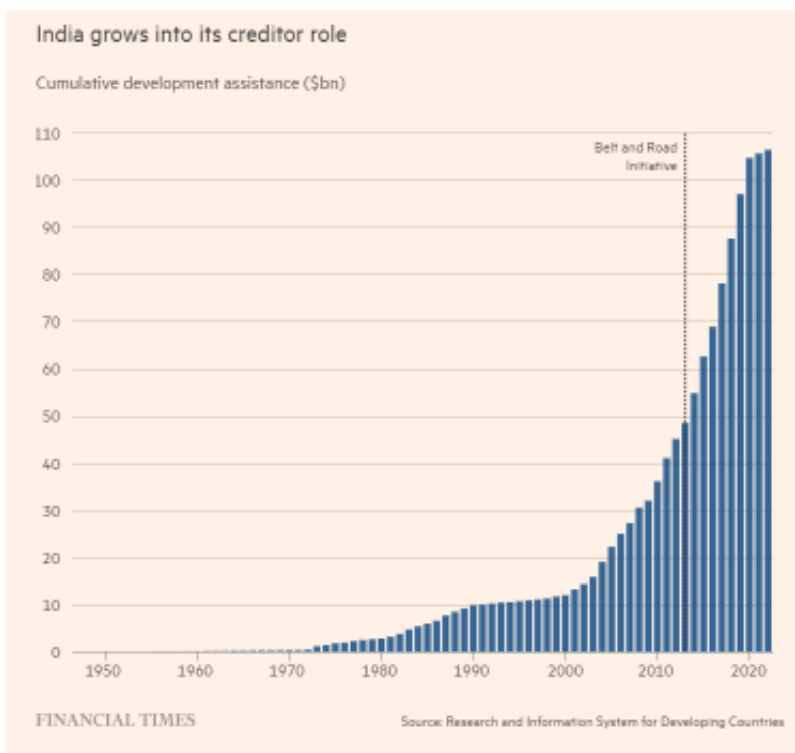
134. AidData, cited in *ibid*.

135. Joe Bavier and Rachel Savage, Chinese loans to Africa plummet to near two-decade low – study, *Reuters*, 19 September 2023, [link](#).

136. Gerda Asmus-Bluhm et al., Does India Use Development Finance to Compete With China? A Subnational Analysis, *Journal of Conflict Resolution*, 2024, 5.

137. Sudhi Ranjan Sen, India Increases Africa Lending in Race to Counter China, *Bloomberg*, 5 July 2023, [link](#).

developing world. Statistical analysis of 1200 government-financed projects launched between 2007 and 2014 convincingly reveals that New Delhi targets aid and financing programmes in places where similar Chinese projects already exist.¹³⁸ This trend has only intensified since 2014 as, under Modi's leadership, credit lines to developing countries have tripled in comparison with the previous eight years.¹³⁹ India's growing desire to tackle Chinese influence in its neighbourhood via competitive financing is particularly observable in New Delhi's expanding credit offerings to financially distressed recipients of BRI investment, such as Sri Lanka.¹⁴⁰ It appears as if India intentionally sought to undercut China by offering credits on far more generous terms, averaging 1% interest rate versus 3.2%.¹⁴¹ Indeed, the BRI appears to have jolted a wholesale adjustment in Indian development financing strategy:



[Source](#)

The Sino-Indian development contest has sparked novel tensions in the surrounding region, as split allegiances impact the domestic politics of other states. In the Maldives, for instance, growing Indian investment in infrastructure has catalysed an “India Out” campaign, a pro-China campaign which frames India's economic activity as a precursor for an expanded military presence.¹⁴² This was spurred in particular by India's offer of \$1bn to assist in paying off Chinese debts, but on the condition that the Maldives distanced itself diplomatically from Beijing. In a similar vein, the Indian Adani Group's securing of a lucrative energy project in

138. Gerda Asmus-Bluhm et al., 2024.

139. Benjamin Parkin and Chloe Cornish, India's plan to take on China as south Asia's favourite lender, *Financial Times*, 1 December 2022, <https://www.ft.com/content/67abce3d-7313-4788-8649-abb9343a2ebc>

140. Anwesha Madhukalya, China's debt-trap diplomacy in the region, and how it impacts India, *Business Today*, 11 April 2022, <https://www.businesstoday.in/latest/world/story/chinas-debt-trap-diplomacy-in-the-region-and-how-it-impacts-india-329371-2022-04-11>.

141. Umesh Moramudali and Thilina Panduwawala, Evolution of Chinese Lending to Sri Lanka Since the mid-2000s – Separating Myth from Reality, *China Africa Research Initiative*, 2022 (8), 21.

142. Nilanthi Samaranayake, As Tensions with India Grow, Maldives Looks to China, *United States Institute of Peace*, 18 January 2024, [link](#).

Sri Lanka led to protests across the country, at what some believed to be a sign of India's "corrupt" influence.¹⁴³

Whilst India and China cooperate in some development fora, such as the New Development Bank/ BRICS Bank, the tidal current is moving towards growing rivalry over 'South-South' investment leadership, with China set to prevail in the medium term at least. Seen within the wider global context, development financing is thus emerging as a major dimension not along 'Global North-Global South' tracks, but of great power competition.¹⁴⁴

143.M. S. Sreeja, "Stop Adani": Sri Lanka Protesters Say PM Modi, President Rajapaksa Struck Deal, *NDTV World*, 16 June 2022, [link](#).

144.Ben Judah et al., Escaping the Permanent Suez: Navigating the Geopolitics of European Decarbonisation, *Atlantic Council*, January 2024, 41-42.

Chapter III: Geopolitical Instrumentalisation of the 'Global South'

A number of geopolitically ambitious members of the 'Global South' are seeking to capitalise on the term's surging popularity, and the growing receptiveness in Western audiences to its causes, to progress their regional and global agendas. This chapter first outlines how, as an expression of such a broad church of loose interests and grievances, 'Southern' initiatives routinely lack purchase in multilateral fora. This very amorphousness is what makes the label vulnerable to co-optation by influential 'Southern' states with geopolitical aspirations. This chapter includes case studies on India and Brazil, but focuses in particular on China and Beijing. Both are exceptional in their desire to orchestrate their multifaceted 'Southern' influence campaigns in a manner which strikingly echoes the Soviet Union's weaponisation of 'Third Worldism'.

3.1: The Vulnerability of the 'Global South' Narrative to Exploitation

The 'Global South' is frequently invoked as a means of galvanising developing state solidarity in international fora. Today, this 'Southern' spirit manifests in multilateral movements centred around a number of core missions: reform of international fora to achieve stronger representation for the 'Global South'; international financial institution debt restructuring; and greater assistance from the 'Global North' amidst the climate crisis. These are all aspirational campaigns, which are broad enough that conflicts between specific interests do not yet pitch individual members against each other. That said, the flimsiness of 'Southern' consensus in the face of contested, practical issues is witnessed annually at COP meetings, when petro-states obstruct the very climate measures demanded by at-risk 'Southern' countries.¹⁴⁵ Despite reports to the contrary, two thirds of the 'Global South' supported Ukraine in the UN General Assembly in February 2023.¹⁴⁶ When pressing material interests are at stake, fidelity to the 'Global South' cause seems to recede into the background.

The consequence of this thin unity is that the 'Global South' can appear an increasingly united front in the UN, even as underlying tensions remain unresolved, and little meaningful progress is made towards shared goals. G77 UN General Assembly voting records between 1980 and

145. Lisa Friedman et al., Saudi Arabia Is Trying to Block a Global Deal to End Fossil Fuels, Negotiators Say, *The New York Times*, 10 December 2023, [link](#).

146. UN, UN General Assembly calls for immediate end to war in Ukraine, 23 February 2023, [link](#).

impact southern imperial poverty movement

reform change need level imperialist interference vulnerable withdraw apartheid arab issu institution financial transparency question liberal sustainable cooperation fact oppression legitimacy commit favour partner problem politics occupation impactful inalienable occupied domination protect south challenge detent independence racist people territory oppress programme goal agenda victorious millennium small socialist address tension regime foreign power colonialism process markind pretoria align refuse help partnership revolutionary capacity

Data source

That the term now rests more on symbolism than material substance is not a controversial point, even for its proponents. One political scientist summarised the ‘Global South’ as “an idea and a set of practices, attitudes and relations.”¹⁵⁰ Another notes that, although the community has become more economically heterogenous over the years, persisting dissatisfaction with global hierarchies still animate multilateral initiatives.¹⁵¹ He reasons that these emotive, historically-derived grievances will outlive global

151. Nicholas Lees, The Brandt Line after forty years: The more North-South relations change, the more they stay the same?, *Review of International Studies*, 2021 47 (1), 87.

material inequalities, predicting that the 'Global South' narrative will endure even once economic power has diffused to the point that "the combined economic significance of the G77 countries approaches that of the OECD nations."¹⁵² Similarly, Oxford academics Sud and Sánchez-Ancochea acknowledge that disparate, at times conflicting, interests amongst the 'Global South' community routinely lead to a "re-alignment and re-re-alignment of postcolonial solidarities."¹⁵³ The fluid political enterprises of the 'Global South' are therefore motivated by an abstract, reactionary 'Southern spirit' more than common material or historical circumstance.

Herein lies the source of the narrative's exposure to geopolitical exploitation: in the dearth of a coherent historical or economic basis for a unified agenda, the 'Global South' is by its very nature defined by what it is not, rather than what it is. This presents aspirational 'Southern' states, as well as anti-Western revisionist adversaries, with a golden influence opportunity – one which, as we shall see, they are duly taking. By conceding to a 'clash of civilisations' style narrative between us and non-West – and formulating policy on that basis– the UK and its allies will only reinforce attempts to co-opt the worldview of the 'Global South'.

INDIA AND THE GLOBAL SOUTH

Under Prime Minister Narendra Modi, India has sought to carve out the space befitting a great power in world politics. Over his decade in office, the Prime Minister and his BJP party have invariably drawn inspiration and legitimacy from ancient Hindu and Buddhist religious texts as part of this mission. Thus, we have seen Modi borrow the same Hindu theological concepts as Jawaharlal Nehru and Rajiv Gandhi, such as *vasudhaiva kutumbakam* (the world is one family), a reference to the Sanskrit *Maha Upanishad* favoured by nationalist politicians when rejecting global imperial hierarchies. In the first years of his leadership, Modi mostly utilised such rhetoric as part of his 'neighbourhood first' foreign policy, which emphasised India's geo-cultural affinities with nearby states.¹⁵⁴ He thus toured religious sites as part of state visits to Nepal, Thailand, Myanmar and Mongolia in 2014, and again in Bangladesh in 2015.

As Modi's geopolitical ambitions have extended beyond India's neighbourhood, he has continued to appeal to the authority bequeathed by ancient theological concepts. He and other senior BJP officials now frequently refer to India's global role with Hindu imagery such as *vishwamitra* (friend to the world), *vishwabandhu* (relative of the universe), and *vishwaguru* (global leader).¹⁵⁵ Even India's fierce commitment to strategic autonomy amidst conflict between the West and the New Axis (China, Russia, Iran, and North Korea) is rooted in religious doctrine; Modi cited the Buddhist concept of *madhyam marg* (the middle path) during a visit to Lumbini, Nepal, in 2022.¹⁵⁶ The "Middle Path" has become a *de facto* strategic doctrine, and is frequently mentioned by External Affairs Minister Subrahmanyam Jaishankar. In his book, *The India Way: Strategies*

152. *Ibid.*, 104.

153. Nikita Sud and Diego Sánchez-Ancochea, 'Southern Discomfort: Interrogating the Category of the Global South', *Development and Change*, 2022 53 (6), 1139.

154. Nalin Kumar Mohapatra, 'How India has emerged as 'voice of Global South' in Modi's era', *Firstpost*, 24 May 2024, [link](#).

155. For example, Narendra Modi speech in New Delhi 21 April 2024, reported in India making a place for itself as "Vishwa Bandhu" in a divided world, *The Hands India*, 21 April 2024, [link](#).

156. Indian Ministry of Culture, Prime Minister Shri Narendra Modi leads the Vaishakha Buddha Purnima celebrations, 16 May 2022, [link](#).

for an *Uncertain World*, Jaishankar seeks inspiration for contemporary geopolitical strategy in the historical parallel with India's non-committal posture during the Cold War, which enabled it to avoid costly embroilment: "whenever crises receded, India went back to the middle path".¹⁵⁷

Over the last few years, the BJP has mounted a concerted campaign for the role of leader of the 'Global South'. In January 2023, India hosted the first Voice of Global South Summit, a new talking shop for 'Southern' states to address 'Southern' issues. Unusually for such multilateral fora, the subsequent second and third summits also took place in India, signalling New Delhi's desire to lock in its leadership (reinforced by its pointed exclusion of China in the first iteration, causing a diplomatic spat which will be discussed later this chapter).

As a nation with a violent colonial past, a strong post-independence development record, and absent the patent hegemonic aspirations of China and the US, India is a natural role model for other 'Southern' states. The leadership has been highly effective in capitalising on this to promote the country's credentials as champion of the 'Global South'. Speaking at the first Voice of Global South Summit in New Delhi, Jaishankar linked the wider community's geopolitical destiny to that of India: "the Global South has always shown the middle path".¹⁵⁸ The BJP's 2024 general election manifesto contained a section titled "Guarantee for Vishwa Bandhu Bharat" (Guarantee for India as Friend to the World), which extolled the virtues of how the party's "human-centric worldview has helped to be a consensus builder, first responder and a voice of the Global South."¹⁵⁹ Separately, India has launched a 5S diplomatic campaign – *Samman* (Respect), *Samvad* (Dialogue), *Sahyog* (Cooperation), *Shanti* (Peace), and *Samridhhi* (Prosperity) –¹⁶⁰ which aligns perfectly with 'Global Southist' ideology.

Beneath the surface, conventional geopolitical dynamics are at work. Sino-American competition has arrived in the 'Global South', risking a return to the Cold War bipolar dynamics that India stiffly opposes. Indeed, as this chapter later shows, China's belated entry into the pageanty contest for 'Global South' leadership has opened a new diplomatic frontier of Sino-Indian rivalry. In the words of former Indian National Security Advisory Board member C. Raja Mohan, "New Delhi's competition for influence in Asia, Africa, and elsewhere is with Beijing, not Washington."¹⁶¹ Although he is right to say that India's proximate competitor is China, it is also true that the former does not wish to see its own neighbourhood transformed into a battleground by any state – an outcome which would disrupt India's development objectives and risk dragging it into zero-sum geopolitics. To return to Raja Mohan's analysis, it is thus fair to conclude that, for India as much as any other power, the 'Global South' "has little explanatory or predictive value in understanding our world". Instead, "championing a so-called global south [sic] is a means to expand global influence."¹⁶²

157. Subrahmanyam Jaishankar, *The India Way: Strategies for an Uncertain World*, (New Delhi: Harper Collins, 2020), 26.

158. Indian Ministry of External Affairs, Opening Remarks by External Affairs Minister, Dr. S. Jaishankar at the Foreign Ministers' Session on G20 of the Voice of Global South Summit, 13 January 2023, [link](#).

159. Bharatiya Janata Party, Modi ki Guarantee 2024, April 2024, 35.

160. Indian Ministry of External Affairs, External Affairs Minister's remarks during launch of India's Priorities for its candidature for the UN Security Council 2021-2022, 5 June 2020, [link](#).

161. C. Raja Mohan, Is There Such Thing as a Global South?, *Foreign Policy*, 9 December 2023, [link](#).

162. Ibid.

3.2: Russian Exploitation of the 'Global South' Narrative

3.2.1: Cold War Origins of Russian 'Global South' Strategy

The story of Russia's exploitation of developing world grievances towards geopolitical ends does not begin in the 1980s with the 'Global South'. During the Cold War, the Soviet Union employed a sustained campaign of *Aktivnye meropriyatiya* ("active measures") to heighten anti-American and anti-Western attitudes in the 'Third World'. Active measures constitute a range of wartime subversive operations – including disinformation campaigns, supporting Russophile political movements, orchestrating domestic unrest, and establishing front organisations – all of which serve the strategic objective of expanding Russian influence abroad at low cost, and challenging that of the West.¹⁶³ As the Russian Federation currently draws from this Soviet playbook in its engagement with the 'Global South', it is helpful to consider Cold War practices before thinking about the Kremlin's contemporary influence campaigns.

Disinformation was a classic Soviet tactic throughout the Cold War. Convincing a population of American perfidy raised the cost of political and economic cooperation, empowering local opposition to American influence and possibly manifesting in action in international fora (or elsewhere). Given that international influence is a limited commodity, the gains are relative: the other superpower will perforce benefit from a decline in the influence of its adversary.

To this end, the narrative of 'Third Worldism' was a useful tool in the Soviet Union's political toolkit. In the words of one Soviet operative, "A single press article containing sensational facts of a 'new American conspiracy' may be sufficient... Other papers become interested, the public is shocked and government authorities ... have a fresh opportunity to clamour against the imperialists while demonstrators hasten to break American embassy windows".¹⁶⁴ Moreover, because the Soviet Union could afford to look ahead much further than the US or its democratic allies, it sought to "radicalise post-colonial elites", complementing these efforts with other forms of outreach to prospective young leaders—while also engendering a broader trend of moral equivocation between America and the Soviet Union: "a pox on both your houses' mentality" in the words of one paper.¹⁶⁵

Throughout the Cold War, the methodology of the Soviet Union was fairly consistent in the deployment of active measures: playing on "suspicions, local political quarrels, racial and tribal conflicts, dissatisfaction with specific policies" and, where possible, on "local memories of Western colonialism".¹⁶⁶ The Soviet Union would act as the sympathetic friend: take, for instance, Brezhnev's 1981 proposal for a "Code of Conduct" for the 'Third World', made during a visit to the Libyan dictator Muammar Gadhafi. Of course, the proposal—with its promises of non-interference, the renunciation of spheres of influence and separatism, and total sovereignty over natural resources—were made insincerely, but served to frame the Soviets as a far more benign actor than

163. Mark Galeotti, *Active Measures: Russia's Covert Geopolitical Operations*, Marshall Center, June 2019.

164. KGB operative quoted in Christopher Andrew and Vasili Mitrokhin, *The Mitrokhin Archive II: The KGB and the World*, (London: Allen Lane, 2005), 54.

165. Directorate of Intelligence, *Worldwide Active Measures and Propaganda Alert*, February 1987, 3, accessed via [link](#).

166. Central Intelligence Agency, Peter Flanigan Request for North-South Analysis, 28 July 1981, 25, accessed via [link](#).

was in fact the case.

In all of these senses, the Soviet playbook prefigures the one used by modern Russia: the 'Global South' has replaced the 'Third World' as a central constitutive element of the active measures toolkit. It hinges on a narrative of an extractive, aggressive 'North'—possessed of the same malicious characteristics that wrought colonialism and imperialism—pit against an innocent 'South' that is besieged: economically, culturally, and politically. The function of this narrative is, now as then, to undermine the intellectual basis for the Western-led world order. The goal is to bleed away international support for the economic and political foundations of this order, or at the very least to generate an equivocation between Western liberal democracy and Russia's own autocratic system. The parallels with today are striking.



Example of Soviet anti-colonialist propaganda disseminated in Africa. Source: Crocodile magazine, September 1960, [link](#)

3.2.2: The Role of the 'Global South' in Russian Ideology

For the Russian state, its invasion of Ukraine definitively splintered its global position and international relationships in two for the foreseeable future: a confrontational relationship with Kyiv and NATO; and a

cooperative one with the non-West resting on mutual structural interests. On the first point, the Kremlin sees itself as in a long-range geopolitical and geo-economic conflict with the West.¹⁶⁷ On the second, the Kremlin believes that it shares a mutual desire with the non-Western world for the emergence of a multipolar order, predicated on the inexorable decline of American hegemony.

According to the Kremlin's 2023 *Foreign Policy Concept*, an emerging multipolar order will comprise a balance of power between regional and civilisational blocs. This necessarily entails a wholesale revision of existing global economic and political structures.¹⁶⁸ Documents emanating from Moscow's inner policy circles frame all revisionist initiatives – from the G77, to the New International Economic Order, to BRICS – as a unified pool of mounting agitation for the demise of American political-economic dominance.¹⁶⁹ Despite not even being a member of the 'Global South', according to official UN databases,¹⁷⁰ Moscow has elected to associate itself with the community.

This outlook is the product of an ideological battle for the soul of the Russian Federation. This debate was unleashed by the collapse of the USSR, and ended decisively with the invasion of Ukraine in 2022. In the run-up to, and aftermath of February 2022, three intellectual groups struggled to shape Russian foreign policy.¹⁷¹ The first 'classical liberal' camp advocated for a lasting détente with the West, and rejected bandwagoning with China and the 'Global South' as the latest iteration of a self-harming anti-Western global posture. In a seminal article propounding this view, "Shattered Illusions of a Bygone Era", Valery Garbuzov argued that Russia's interests are best served by rejecting the "tragic pattern" of expansionism, which has generated a cycle of imperial aggrandisement and collapse throughout the state's history.¹⁷² Within a week of publishing the piece, Garbuzov was removed from his role as Director of the U.S. and Canada Studies Institute (ISKRAN) at Russia's Academy of Sciences. ISKRAN published an article defending Garbuzov in the same newspaper, which was swiftly taken down – indicating it runs contrary to the Kremlin's working theory.

The second view, which has been coined 'defensive civilisationalism' or 'conservative enlightenment',¹⁷³ paves a middle ground between the Western and non-Western world. Russia will never become fully integrated in the Western economic and civilisational order, but it should avoid wholesale collapse of relations between the two. Rather than bandwagon with China, Russia should stand alone and invite deeper Sino-Western conflict.¹⁷⁴ Conservative enlightenists, such as Boris Mezhuiev (see footnote 152), advocate a *Realpolitik* foreign policy based on restraint from open confrontation with the West, and consolidated ties with the 'Global South'. The invasion of Ukraine therefore represented a decisive rejection of this world view by Vladimir Putin.

The third, and now prevailing, school of thought regarding Russia's place and function in the role is that of 'offensive civilisationism'. This is the most hawkish of the three, and demotes all other objectives below that of deconstructing Western hegemony and replacing it with a multipolar

167. Sergei A. Karaganov et al., *Russia's Policy Towards World Majority*, *Council on Foreign and Defence Policy*, 2023, 9.

168. The Ministry of Foreign Affairs of the Russian Federation, *The Concept of the Foreign Policy of the Russian Federation*, n. 229, 31 March 2023, [link](#).

169. For example, *Russia's Policy Towards World Majority*, 12.

170. Finance Center for South-South Cooperation UN, *Global South Countries (Group of 77 and China)*, [link](#).

171. Pavel K. Baev et al., *Russia End State: China and the Global South*, *Marshall Center*, 21 November 2023, [link](#).

172. Valery Garbuzov, *Shattered Illusions of a Bygone Era*, *East View Press*, originally *Nezavisimaya Gazeta*, 30 August 2023, [link](#).

173. The latter is used by one of the group's primary exponents, Boris Mezhuiev, Chair of Russian Philosophy at the Institute of Scientific Information for Social Sciences of the Russian Academy of Sciences.

174. Pavel K. Baev et al., *Russia End State: China and the Global South*, 2023.

order. This concept derives from the Primakov Doctrine of the 1990s – eponymously named after then Minister of Foreign Affairs Yevgeny Primakov – which reasons that, as an eternal superpower, Russia cannot permit its American rival to dominate a unipolar international order. Primakov, whose ideology current Foreign Minister Sergei Lavrov claimed must be studied closely by future Russian politicians and historians,¹⁷⁵ concluded that Russia could not achieve this objective unless it cooperates with India and China.

As Lavrov anticipated in 2014, the Primakov Doctrine has experienced a revival since the annexation of Crimea and invasion of Ukraine – in the form of offensive civilisationalism. The contemporary intellectual vanguards of this movement include Aleksandr Dugin, the Kremlin's foremost interface with European ethnonationalist movements, and Sergei Karaganov, head of the Council for Foreign and Defence Policy, a pseudo-think tank with extensive links to Russian military intelligence.

Over the last few years, Putin has decisively gravitated towards the offensive civilisational world view. In February 2022, weeks before Russia's full-scale invasion of Ukraine, Russia and China declared a no-limits partnership in favour of "democracy", which in reality simply means a rejection of the Western-led global system.¹⁷⁶ In September 2022, the president used a speech marking the formal annexation of Ukraine's Donetsk, Luhansk, Zaporizhia, and Kherson regions to rail against the West, which is allegedly "ready to step over everything in order to preserve the neo-colonial system that allows it to parasitise... the world... to extract... the rent of the hegemon."¹⁷⁷ At the Valdai Club last year, he claimed that "the world is on its way to a synergy of civilisation-states, large spaces, communities identifying as such."¹⁷⁸ As with defensive civilisationalism, the offensive brand emphasises the expansion of Russian relationships with the 'Global South', in order to force a cleavage with the Western world. Unlike those of the defensive ilk, offensive civilisationists mandate that Russia must be at the vanguard of the new multipolar order.

The Russian state's prevailing ideology therefore assigns vital importance to enhanced engagement with the 'Global South'. The grand strategic ambition to dislodge the West – and to replace it with a constellation of civilisational and regional blocs – fundamentally depends on isolating the US and its allies from an increasing proportion of the global community.

The intellectual rationale and policy blueprint for this objective was provided last year by a paper published by the influential Karaganov's Council on Foreign and Defence Policy. The report identifies an ongoing turning point in global dynamics – heralded by the eastward shift in economic power, escalating Sino-American competition, the Ukraine War, and increasingly tendency of emboldened 'Global South' states to reject American political leadership – and urges Russia to channel its foreign policy towards "breaking up the West's unity".¹⁷⁹ Remarkably, the paper encourages Moscow to prepare "for a possible conflict escalation, including through political or even – in extreme cases – direct use of the nuclear factor."¹⁸⁰

175. Lavrov predicts historians may coin new term, the Primakov Doctrine, *RIA Novosti*, 28 October 2014, [link](#).
176. Sergey A. Karaganov et al., Russia's New Turn towards World Multipolarity, Council on Foreign and Defence Policy, 2023, 12.

177. Joint Statement of the Russian Federation and the People's Republic of China on the International Relations Entering a New Era and the Global Sustainable Development, 4 February 2022, accessed and translated in China Aerospace Studies Institute, [link](#).

178. Full text of Putin's speech at annexation ceremony, *Mirage News*, 1 October 2022, [link](#).

179. Valdai International Discussion Club meeting, *The Kremlin*, 5 October 2023, [link](#).

It is noteworthy that the paper, titled “Russia’s Policy Towards World Majority”, rejects the term ‘Global South’ due to its association with globalisation, deemed a Western concept. Instead, Russian policy circles now favour the ‘World Majority’, which has been suitably rid of any vestiges of Western ideology. The purpose is to rebut entirely the West’s claim to a conceptual and political relationship with these states, by positioning them exclusively within a community spearheaded by Russia. Nonetheless, the document and its authors treat the two terms synonymously.

There is an inherent contradiction in Karaganov’s vision for emergent multipolarity, which reveals the true intentions of Moscow’s renewed focus on the non-West. On the one hand, Russia’s ideal geopolitical future will be acephalous, ruled by norms which “cannot imply anyone’s dominance”.¹⁸¹ On the other, Karaganov perceives Russia as the “most important geopolitical resource and, in fact, [the] military-political core.”¹⁸² Despite the ostensible desire for the disintegration of global hierarchies, therefore, Moscow peddles this narrative as a rhetorical veneer to conceal its ambitions to assemble and lead an anti-Western coalition.

Russian policy across the Middle East, Africa, and Latin America shifted towards an aggressively anti-Western stance as early as the early 2010s.¹⁸³ But the Ukraine War, and Russia’s resultant expulsion from the Western political and economic system, have increased the urgency of Moscow’s economic expansion in these regions. The report labels the ‘Global South’ (or World Majority) Russia’s “most important foreign policy asset”, as it comprises a pool of states “not fully controlled by the West... [which] significantly limits the effectiveness of anti-Russian sanctions.”¹⁸⁴ The ‘Global South’/‘World Majority’ is therefore perceived to serve Russian grand strategy in two manners: the policy objective of circumventing Western sanctions and keeping the war economy afloat; and the strategic objective of weakening support for the Western order.

Before elaborating on Russia’s multi-tiered engagement with the ‘Global South’, it is important to assess the impact of the Ukraine War on both Moscow’s grand strategy and, as a function, its ‘Global South’ strategy. In both regards, February 2022 was a watershed moment. As mentioned previously, the conflict symbolises for the Kremlin a decisive rift with the West, and has resulted in all other geopolitical activities being subordinated to the diplomatic, military and economic exigencies of the war effort. To that end, victory is a *strategic objective* in and of itself – which necessitates fostering relations with non-Western states.

The conflict has also – in its view – sped up Moscow’s long-term ambition to re-shape the world order. In this sense, the Ukraine War acts as a *strategic advantage* for Russian grand strategy, in addition to being a discrete objective in itself. Strategic advantage is a function which induces catalysts to achieve national objectives.¹⁸⁵ Framed in this way, Russia is leveraging the Ukraine War to catalyse its efforts to build consensus behind an alternative, multipolar world order – and to pull states away from the Western orbit. Put simply, Moscow views the Ukraine War –

185. Gabriel Elefteriu et al., What is strategic advantage?, *Council on Geostrategy*, November 2023, 3.

181. Ibid., 6.

182. Ibid.

183. Kadri Liik, From Russia with love: How Moscow courts the global south, *European Council on Foreign Relations*, 21 December 2023, [link](#).

184. Sergei A. Karaganov et al., Russia’s Policy Towards World Majority, *Council on Foreign and Defence Policy*, 2023, 15.

and the desire amongst non-Western states to maintain neutrality – as an opportunity to hasten the demise of American and Western influence. The 'Global South' therefore fits into both strategic functions of the Ukraine War.

Fig. 3. Russia's Strategy for the World Majority



Source: compiled by the authors

[Source](#)

3.2.3: Russian Activities in the 'Global South'

Unlike China, Russia does not have the economic heft to attract and compel state loyalty via investment and financial assistance. Estimates suggest that as much as 30% of Russia's annual budget is now being spent directly on the war in Ukraine.¹⁸⁶ These constraints, on top of the broader limitations of the Russian economy, preclude Moscow from mimicking China's 'Global South' policy based on vast financial inducements. Russian investment into Africa accounts for below 1% of the state's total global FDI, and trade with the continent stands at \$18bn per year,¹⁸⁷ far short of the US (\$64bn) and China (\$254bn).¹⁸⁸

Russia has learnt to accommodate these shortfalls by blending low-cost instruments into a broad strategy for influence acquisition in the 'Global South'. This strategy does not distinguish between hard and soft power, but combines covert methods of influence and manipulation with projected military and financial means.¹⁸⁹ In Karaganov's words:

"Russia should stop using the term 'soft power'... We should be talking about our inherent competitive advantages, including the ability to be a "provider" of military and food security, as well as health services. An important point is that the presence of Russia as an important factor in international relations offers a political and economic alternative similar to the one that disappeared after the collapse of the USSR."¹⁹⁰

Russia has formulated a multifaceted approach to the 'Global South' along these lines. Alongside its aforementioned advocacy of the 'Global South' community in multilateral fora, Moscow pursues a 'pincer

190. Sergei A. Karaganov et al., *Russia's Policy Towards World Majority*, Council on Foreign and Defence Policy, 2023, 36.

186. Boris Grozovski, *Russia's Unprecedented War Budget Explained*, Wilson Center, 7 September 2023, [link](#).

187. Alex Vines and Tighisti Amare, *Russia-Africa summit fails to deliver concrete results*, Chatham House, 2 August 2023, [link](#).

188. Mariel Ferragamo, *Russia's Growing Footprint in Africa*, Council on Foreign Relations, 28 December 2023, [link](#).

189. See Mark Galeotti, *Active Measures: Russia's Covert Geopolitical Operations*, Marshall Center, June 2019 (31).

strategy' of activities within the regions themselves: on one end are a suite of political elite-targeted security-economic partnerships, first developed by state-affiliated private military companies (PMCs) from the 2010s – most infamously the Wagner Group; on the other, the Kremlin aspires to shape societal attitudes via a concerted disinformation campaign which plays extensively on 'Global Southist' anti-Western tropes. Africa is by far the success story of this strategic engagement, as it is here that PMCs have provided the on-the-ground presence which functions as a figurative bridgehead for acquiring wider influence. This stands in contrast to Moscow's more limited achievements in Latin America, where societal influence campaigns alone have struggled to exploit 'Global Southist' disillusionment as effectively.¹⁹¹ This itself is indicative of the fact that the usual logic and material basis of geopolitical competition applies in the 'Global South', a reality which Russia soundly grasps. Its appeals to 'Global Southism' are strictly a gambit to foment anti-Westernism, and to provide cover for its own predatory behaviour.

Beginning with the first element of this pincer strategy, state-affiliated PMCs serve as proxies through which Moscow can acquire leverage over targets' geopolitical stances, and reach deals to extract valuable natural resources. Moscow has replicated this blueprint so often as to lead one group of analysts to coin it the 'Entente Roscolonial', a strategy designed to make targets pliant to Russian influence, benefit the Russian economy, and displace Western presence from these regions.¹⁹² These parastatal activities may have predated the Russian state's instrumentalisation of the 'Global South' narrative but, as will be seen, also laid the foundations for concerted diplomatic overtures under this ideological umbrella. In that sense, security provisions are an investment for future diplomatic and economic returns – made all the more attractive by the ability to offset downpayments to parastatal agents like Wagner.

From 2014 until Yevgeny Prigozhin's mutiny and death in 2023, the primary vehicle for these security-economic deals was the Wagner Group. According to a report published last year by the House of Commons Foreign Affairs Committee,¹⁹³ the Wagner Group has in the last decade built a complex multistate network comprising military operations in at least seven countries,¹⁹⁴ and non-military activities in 10 further states.¹⁹⁵ On top of this, as of November 2023, the Russian state has signed military cooperation agreements with 43 African countries.¹⁹⁶

This activity has generated profound influence and material returns over the years. At the extreme end of the spectrum, Wagner forces have directly fought against American troops in Syria – pushing back against Western military objectives in the Middle East.¹⁹⁷ Elsewhere, the provision of security assistance has facilitated access to prized economic resources. In the DRC, the group is reportedly supporting President Felix Tshisekedi's struggle with rebel forces in return for access to the country's diamond trade.¹⁹⁸ In Libya, Wagner has been rewarded with control of oil resources for its technical assistance and weapons delivery to the National Army, thereby constraining Western access to the country's fuel reserves.¹⁹⁹

198. The Africa Report, How Wagner Prigozhin teamed up with the CAR's diamond mafia, 7 July 2023, [link](#).

199. Robert Uniacke, Libya Could Be Putin's Trump Card, *Foreign Policy*, 8 July 2022, [link](#).

191. For more, see Ivan U. Klyszcz, Russia's Changing Latin America Strategy, *PONARS Eurasia*, 5 February 2024, [link](#).

192. Jack Watling et al., The Threat from Russia's Unconventional Warfare Beyond Ukraine, 2022-2024, *RUSI*, February 2024, 14.

193. House of Commons Foreign Affairs Committee, Guns for gold: the Wagner Network exposed, *House of Commons*, 18 July 2023.

194. Ukraine, Syria, the CAR, Sudan, Libya, Mozambique, Mali.

195. Zimbabwe, the DRC, Madagascar, South Africa, Afghanistan, Burkina Faso, Cameroon, Chad, Serbia, Zambia.

196. Anna Caprile and Eric Pichon, Russia in Africa: An atlas, *European Parliament Members' Research Service*, February 2024, 7.

197. McFate, Sean. 2019. *Mercenaries and War: Understanding Private Armies Today*. Washington DC: National Defense University Press. December.

President Omar Bashir of Sudan signed a security-economic agreement in Moscow in 2017, receiving military support in return for granting Russia a naval base in Port Sudan, and a gold mining concession for M-Invest, a Russian firm with links to Prigozhin.²⁰⁰

Rather than see the benefits of these parastatal activities dissipate after Prigozhin's downfall, the Kremlin successfully absorbed Wagner's operations into state military apparatus. After last year's mutiny, Wagner's African branch has been subsumed under the GRU and Russian Ministry of Defence. The GRU's new Expeditionary Corps in Africa, termed the *Africa Corps* in an ironic reference to Nazi General Erwin Rommel, fulfils the former responsibilities of Wagner overseas forces. Moscow now brands its offering to African leaders as "regime survival packages" in return for access to critical minerals and other strategically valuable resources.²⁰¹

As the state can no longer plausibly deny agency over the formerly-parastatal PMC operations, it now openly utilises them towards the ambition of dislodging Western influence in Africa. It is thus no coincidence that both the Kremlin and state-affiliated PMCs have chosen to target unstable African states with unresolved colonial pasts and simmering anti-Western sentiment. For example, an internal Russian document proposed last year that deepening ties with Niger present the opportunity to threaten France's access to the country's uranium, thus making Paris more reliant on Russian-supplied uranium.²⁰²

The assimilation of Wagner into the state, and the reincarnation of its African activities as the GRU *Africa Corps*, have enabled the Kremlin to pursue a much-expanded Africa strategy.²⁰³ However, the state-sanctioned status of these military-security deals runs the risk of exposing Moscow to the same allegations of neo-imperialism which it levels against the US and former colonial European powers. It is here that the second component of Russia's pincer strategy for the 'Global South' comes into play; ever the opportunist, Moscow has built a constellation of disinformation networks to peddle 'Global Southist' tropes in target African states, thereby neutralising the threat of a moral equivalence being drawn between its activities and the West.

The Kremlin first began putting together a constellation of propaganda networks across Africa, known as the 'Russosphere', in 2021. This was formally launched days before the invasion of Ukraine. In 2023, a joint investigation²⁰⁴ by the BBC's Global Disinformation Team and Logically identified Belgian political activist Luc Michel as the head of the Russosphere operation, who is also thought to have orchestrated the Kremlin's referenda in Crimea and the Donbas in 2014.²⁰⁵ The report concludes from an analysis of Russosphere content that "typical posts accuse France of modern-day "colonialism", [and] eulogise Vladimir Putin."²⁰⁶

200. Watling et al., The Threat from Russia's Unconventional Warfare Beyond Ukraine, 2022-2024, *RUSI*, February 2024, 21.

201. Internal Russian government documents seen by the BBC, in Joe Inwood and Jake Tacchi, Wagner in Africa: How the Russian mercenary group has rebranded, *BBC*, 20 February 2024, [link](#).

202. Document prepared for senior Russian officials in September 2023, cited in Watling et al., 23.

203. Nicodemus Minde, Russia's Africa Corps – more than old wine in a new bottle, *ISS*, 7 March 2024, [link](#).

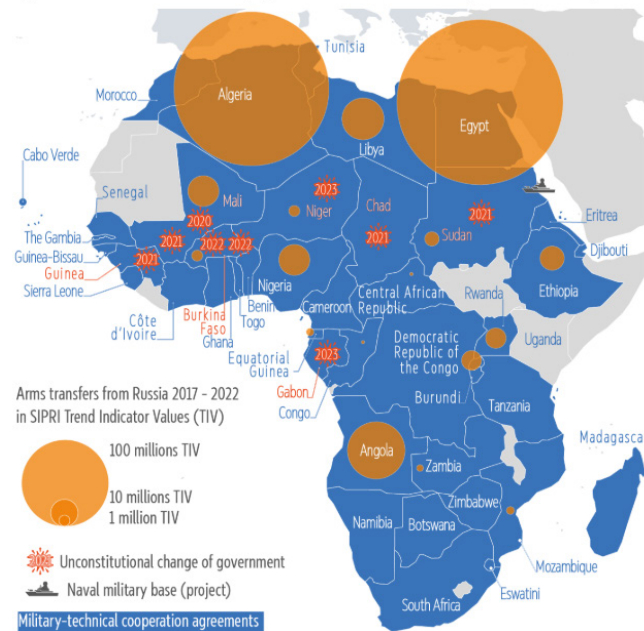
204. Grigor Atanesian, Russia in Africa: How disinformation operations target the continent, *BBC*, 1 February 2023, [link](#).

205. Shannon Bond, A pro-Russian social media campaign is trying to influence politics in Africa, *NPR*, 1 February 2023, [link](#).

206. Grigor Atanesian, Russia in Africa: How disinformation operations target the continent, *BBC*, 1 February 2023, [link](#).

Military agreements

Figure 6 – Russia-Africa military agreements and arms trade, and recent coups



[Source](#)

All state-sanctioned Russosphere propaganda thus promotes the same 'Global Southist' tropes: the duplicity of persistent Western neocolonialism; colonialism and capitalism as the cause of the 'Global South's' enduring economic woes; and the capacity of Russia to play the role of modern-day emancipator.²⁰⁷ Individual content may not make reference to the 'Global South', but replicates the anti-Western themes detailed in Karaganov's report on the 'World Majority' discussed previously. These efforts are therefore integral to Russia's 'Global South' co-optation strategy, as demonstrated by the read-out from a Roscongress report of 2019 titled "Russian-African relations: the role of the media".²⁰⁸ The document advocates the "expansion of the [Russian] foreign correspondent network" in Africa to compete with the prevalence of Western media across the continent. This strategy conforms entirely to Karaganov's policy towards the world majority, which proposes that Russia "should develop and strategically build a network of correspondents working for the leading Russian media in the World Majority countries and present its own picture of the world that is not influenced by Western narratives."²⁰⁹

207. Sergei Sukhankin, Russia Struggles for 'Hearts and Minds' in Global South (Part One), *The Jamestown Foundation*, 22 February 2024.

208. Roscongress, Российско-африканские отношения: роль СМИ, 23 October 2019, [link](#).

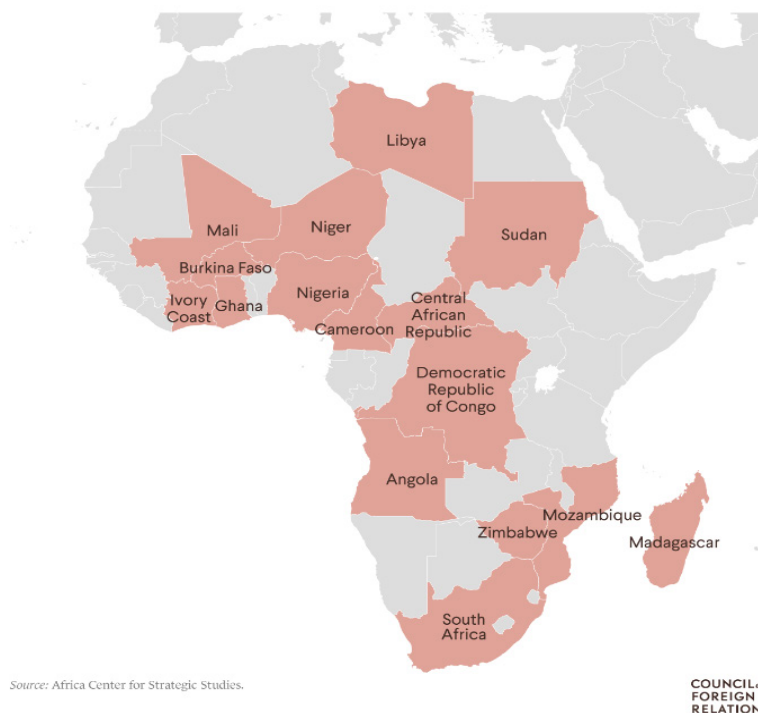
209. Sergei A. Karaganov et al., Russia's Policy Towards World Majority, *Council on Foreign and Defence Policy*, 2023, 36.



Russian propaganda sign in the Central African Republic. Source: [Twitter](#), @Sam-Ramani2, 17 January 2021

Where Has Russia Waged Disinformation Campaigns in Africa?

Countries that have experienced Russia-sponsored disinformation campaigns as of April 2022



The Russosphere. [Source](#)

The Russosphere constitutes only one element of Moscow's sprawling, interconnected African disinformation web – which resembles a sophisticated 'hub and spoke' model. At the centre (or the 'hub') are Moscow-based, state-controlled media institutions – namely Russia Today (RT), TASS and Sputnik – which work closely with the Kremlin to develop the themes and messaging of the media assault. The state's total control of Russian media is well documented,²¹⁰ and the UK Government has sanctioned the Managing Director of RT, Alexey Nikolov, and Head of Sputnik International Broadcasting, Anton Anisimov, for their involvement in Russian disinformation.²¹¹

Serving as the central disinformation node, RT, TASS, and Sputnik have all established branches in Africa: the 'spokes' of the network. In 2022, Sputnik launched a French-language Sputnik Afrique agency in Francophone Africa, which is managed by its parent company's headquarters in Rossiya Segodnya, Moscow.²¹² Following last year's expansion, TASS has offices across the continent in Kenya, Tunisia, Zimbabwe, Egypt, Morocco and South Africa.²¹³ Meanwhile, RT controls RT Arabic from Algeria. RT makes up for its relatively limited presence in Africa with a large presence and following in Latin America, illustrating the high degree of coordination across the entire 'Global South'.²¹⁴

The flagship initiative is Afrique Média (AM), a "mouthpiece for the Kremlin" established in Cameroon in 2008.²¹⁵ The channel – which as of last year boasted 1mn Facebook followers and 822,000 YouTube subscribers – enjoys intimate ties with the Russian elite. In 2022, AM and RT announced a partnership to "combat Western propaganda".²¹⁶ At the 2023 Russia-Africa Summit, head of AM Justin Tagouh was photographed shaking hands with Prigozhin.²¹⁷ An analysis of AM's content revealed a strong bias in favour of Wagner activities, presenting it as an anti-terror solution for African governments –²¹⁸ a portrayal which has not changed after Prigozhin's death.

At first, the ability of these Russia-controlled agencies to penetrate African society remained limited.²¹⁹ Between January and March last year, Sputnik Afrique received around 1mn online visits, a stark contrast with the BBC's 1.5bn monthly traffic.²²⁰ However, the model has been adapted by developing subsidiary 'spokes': collaborative relationships with local outlets and journalists within target countries. The aforementioned Roscongress report (2019) identified these indigenous partnerships as the second priority of Russia's informational operations in Africa. As a result, Moscow has signed a flurry of additional partnerships with existing African and Middle Eastern-based media channels, including Africa24 (Kenya), Al-Ghad (Jordan), Pan African TV (Ghana), and the African Union of Broadcasting.²²¹

Using local media as a trust-winning mouthpiece for Kremlin-inspired propaganda within the indigenous community has paid off. Since the Ukraine War began, Sputnik Afrique's key audience has shifted from Europe to Africa. Whereas before 2022, 75% of page visits originated from France, that number is now at 30%. On the other hand, the share

210. For example, see BBC Monitoring, Russia media guide, BBC, 6 March 2023, [link](#).

211. UK Govt, Foreign Secretary announces sanctions on Putin's propaganda, 31 March 2022, [link](#).

212. Maxime Audinet, Cat and mouse: The mutations of Russia's international state media RT and Sputnik, *Russia Post*, 24 March 2023, [link](#).

213. Moscow24, TACC расширит присутствие в Африке, 1 September 2023, [link](#).

214. Mark A. Green, Latin America Loves Russia Today Publication, *Wilson Center*, 18 July 2023, [link](#).

215. Gretel Kahn, A Kremlin mouthpiece at the heart of Africa: how Afrique Média helps Putin court audiences in their own language, *Reuters Institute*, 19 September 2023, [link](#).

216. Afrique Média YouTube, Partenariat Afrique Média – RT: Bientôt la fin de la "Propagande Mensongère Occidentale", *YouTube*, 27 December 2022, [link](#).

217. BBC, Prigozhin: Wagner boss spotted in Russia during Africa summit, BBC, 28 July 2023, [link](#).

218. Code for Africa, sourceAFRI-CA, August 2023, [link](#).

219. For example, Sputnik Afrique is predominantly controlled by its parent company at Rossiya Segodnya, Moscow. Maxime Audinet, Cat and mouse: The mutations of Russia's international state media RT and Sputnik, *Russia Post*, 24 March 2023, [link](#).

220. BBC, New data shows BBC is the world's most visited news site, BBC, 15 June 2021, [link](#).

221. Sergei Sukhankin, Russia Struggles for 'Hearts and Minds' in Global South (Part One), *The Jamestown Foundation*, 22 February 2024.

of the African continent has increased from <5% to 30% over the same period.²²² The increasingly sophisticated structure of this network enables messaging to be more nuanced and catered to specific audiences. The content strictly adheres to 'Global Southist' tropes. For example, AM posted a video three months ago, amidst civil unrest in Burkina Faso, accusing France of stirring the instability, which drew a direct line between French colonial rule and contemporary instability.²²³

The West has been slow to recognise this strategic shift, having focused initially on rooting out Russian disinformation within its own territories and digital systems after the outbreak of the Ukraine War. At last year's EU External Action Service (EEAS) Conference on Foreign Information Manipulation and Interference, High Representative Josep Borrell noted how, across Africa, Latin America and South-East Asia, Russia "is using information manipulation and interference as a crucial instrument... to conquer the spirit, the intelligence, the understanding of the people."²²⁴ During the speech he revealed that EEAS had collected 15,000 cases of Russian disinformation campaigns across the three regions – mostly but not exclusively related to absolving Moscow for the Ukraine War. Whilst EEAS's subsequent report on 'Foreign Information Manipulation and Interference Threats' was substantial,²²⁵ it is regrettable that this first instalment came so late in the day; active measures have been a staple of Russia's arsenal for a century. What is new is the technological and digital enablers which Russia has at its disposal – a point Borrell acknowledges aptly as he remarks "Goebbels had no internet, and no social media instruments."²²⁶

Another component of the 'hub and spoke' model is the involvement of Russian special services, and the Wagner Group's still extant disinformation network. The Federal Security Service's (FSB) Fifth Service (or Service for Operational Information and International Communications) – tasked with Russia's overseas political influence and psychological operations – recently supervised the creation of African Initiative. In a video posted on 30 September 2023, Artem Kureev – the senior FSB agent and chief architect of African Initiative – said that its purpose is to open opportunities on the continent to Russia and its allies, such as China and India.²²⁷ On African Initiative's first Telegram channel post, Kureev stated that the outlet would highlight postcolonial legacies.²²⁸ On all accounts, this fits into the parameters of Russia's Global South strategy – supporting multipolarity and spreading anti-Western sentiment.

African Initiative is thought to be closely linked to the Wagner Group's own disinformation network in Africa – thereby amplifying its reach.²²⁹ The Wagner Network has established a panoply of at least 85 Telegram Channels – such as the popular "Smile and Wave" channel – which target African audiences, which invariably depict the group in a positive light, in contrast to a neo-imperial Western regional presence.²³⁰ The receptivity of African populations to such manipulation is observable in the viewership, which spikes during periods of heightened civil unrest. For example, during a weekend of sub-continent-wide rebellion between 23-26 June

222. Maxime Audinet, Cat and mouse: The mutations of Russia's international state media RT and Sputnik, *Russia Post*, 24 March 2023, [link](#).

223. Afrique Média YouTube, La France et ses allies sont derrier ce qui se passe au Burkina Faso, *YouTube*, 15 January 2024, [link](#).

224. Josep Borrell, Disinformation: Opening speech by High Representative/Vice-President Josep Borrell at the EEAS Conference on Foreign Information Manipulation and Interference, *EEAS*, 7 February 2023, [link](#).

225. EEAS, 1st EEAS Report on Foreign Information Manipulation and Interference Threats, February 2023.

226. Josep Borrell Speech at EEAS Conference, 2023.

227. Telegram, Zvezda TV, posted by Colonelcassad, 30 September 2023, [link](#).

228. Telegram, African Initiative, 2 October 2023, accessed <https://perma.cc/S4U7-DWFK>.

229. Sergei Sukhankin, Russia Struggles for 'Hearts and Minds' in Global South (Part Two), *Jamestown Foundation*, 23 February 2024, [link](#).

230. Medium, Pro-Wagner sentiment remains strong in Africa, *African Digital Democracy Observatory*, 7 August 2023, [link](#).

2023, a total of 6,602 Wagner-sympathetic Facebook posts garnered almost 1mn interactions.²³¹ The FSB-Wagner collaboration has endured beyond the death of Prigozhin, as the intelligence service has maintained contacts with the parastatal group's regional "political strategists".²³² This coalescence of state-affiliated Russian media, indigenous outlets, intelligence service operations, and pre-existing Wagner networks – all into a coordinated and highly active mouthpiece for 'Global Southism' – serves as an effective smokescreen for Moscow's cynical agenda across the continent.

A particularly profitable focal point of African Initiative has been Western vaccine rollouts during and post-COVID-19. The outlet has launched an assault of anti-Western health-related conspiracy theories across Africa.²³³ This appears to be part of a major disinformation campaign to leverage the post-COVID 19 pandemic environment by alleging that the West trials unknown drugs on the African population.²³⁴ African Initiative thus replicates Operation Denver, the Cold War active measure disinformation campaign to promote the idea that the US had invented AIDS.

The strategic impetus for this line of attack is to neutralise the would-be reputational benefits accruing to the West following the essential role its pharmaceutical industry played in overcoming the pandemic, and the monumental vaccine distribution initiative – COVAX – managed by the WHO, the European Commission, and the G20, which delivered over one billion vaccines worldwide (85% to lower-income countries).²³⁵ Thus, just as many left-leaning Western policy circles champion the soft power of health diplomacy,²³⁶ Russia exploited a 'clash of civilisations' narrative to sow discord between Western states and African health aid recipients.

The final 'spoke' of this 'black PR' Leviathan is the Russian-educated Africans who are employed by pro-Kremlin media channels. Again, there are loud echoes of Russia's 'Third World' tactics during the Cold War. The Soviet Union extended a generous programme of scholarships to Africans in Russian universities, who would invariably be indoctrinated in Marxist-Leninist ideology and deployed to Africa as either sympathetic actors, or explicit KGB assets. As today, this was not an altruistic initiative, but a pragmatic one designed to enhance the USSR's reputation in the 'Third World'.²³⁷ Russian university scholarships extended to African students have increased by 150% in the past three years, with a further 47,000 places expected by the end of this year.²³⁸ The expectation is that, owing their education to Moscow, these students will either return to Africa – or operate from Russia – as loyal mouthpieces for the Kremlin.²³⁹

Despite the relative nascency of this scheme, the fruits are already discernible. Artem Kureev, architect of the FSB's African Initiative, has held meetings with African student societies at the Moscow State Institute of International Relations (MGIMO). One MGIMO and member of the university's African Club, Nikita Panin, set up the pro-Kremlin "African Through the Looking Glass" Telegram channel last year – reportedly recruiting Russian-educated African students to oversee the content.²⁴⁰ Last April, MGIMO hosted the third International Youth Forum on

231. Ibid.

232. Dada Lindell et al., Black PR. The FSB has launched a campaign of disinformation and conspiracy theories in Africa, *The Insider*, 8 February 2024, [link](#).

233. Africa Initiative, О ПРОЕКТЕ, [LINK](#).

234. For example, see Africa Initiative, A Recipe for Sovereign Medicine. Healthcare And Russia's African Strategy (РЕЦЕПТ СУВЕРЕННОЙ МЕДИЦИНЫ. ЗДРАВООХРАНЕНИЕ И АФРИКАНСКАЯ СТРАТЕГИЯ РОССИИ), 31 January 2024, [LINK](#).

235. UNICEF, COVAX: 1 billion vaccines delivered, 19 January 2022, [link](#).

236. For example, see From Expertise to Influence: UK's Soft Power in Global Health, *Coalition for Global Prosperity*, 25 April 2024.

237. Maxim Matusevich, Journeys of Hope: African Diaspora and the Soviet Society, *African Diaspora*, 2008 (1), 68.

238. Maina Waruru, Scholarships for Africans in Russia grow by 150%, *Pie News*, 4 August 2023, [link](#).

239. US Department of State, The Kremlin's Efforts to Spread Deadly Disinformation in Africa, *Office of the Spokesperson*, 12 February 2024, [link](#).

240. Dada Lidell et al., 2024.

Russia-Africa, which discussed the effects of colonial legacies on the continent, and enhancing Russian-African cooperation. Foreign Minister Sergei Lavrov provided a video message,²⁴¹ and prominent anticolonialist resistance campaigner Kémi Séba attended alongside a mix of young African students and political officials.²⁴²

NIGER – A CASE STUDY IN RUSSIAN 'GLOBAL SOUTH' STRATEGY

Russia's involvement in Niger's coup offers a perfect vignette of its 'Global South' strategy – using anti-Western 'Global Southist' propaganda as cover for expanding its military presence and diplomatic influence in Africa.

Between Niger's return to democratic rule in 2011 and 2023, the country underwent three peaceful power transitions. Throughout this period, the US provided the government with assistance to uphold democratic governance, fight corruption, bolster resilience to violent extremism, and promote civil liberties.²⁴³ This came to a violent halt last July when the presidential guard, led by General Abdourahamane Tchiani, overthrew and detained President Mohamed Bazoum. Despite efforts from the international community and the Economic Community of West African States (ECOWAS) to broker a negotiation to restore democratic rule, the junta officially ended Niger's military arrangement with Western governments this March by expelling French troops, and ordering all American personnel to leave by September.²⁴⁴

There is unassailable evidence of Russian meddling in the run-up to the coup, as well as in the period before the junta's rejection of a return to democratic transitions of power. Even before the coup, pro-Russian Telegram channels floated Niger as the latest target of Russia's disinformation campaign across Africa, which had already played an influential role in fomenting unrest and supporting coups in Mali and Burkina Faso.²⁴⁵ Coinciding with President Bazoum's overseas trip in February 2023, disinformation networks linked to the Wagner Group peddled rumours that the presidential guard was preparing to launch a coup.²⁴⁶ As the coup unfolded, Prigozhin praised the move whilst attending the Russia-Africa Summit, and Wagner-linked African media channels encouraged Nigeriens to suppress violent pro-democracy demonstrations in Niamey.²⁴⁷ During these months, Niger-related content on Russian state and Wagner-linked African Telegram channels jumped by 6,645%.²⁴⁸ Central to the messaging was the idea that the anti-coup movement was a Western insurgency against the will of the Nigerien people, and the latest iteration of Western imperialism at the hands of France. The successful attempt to sow confusion and create an environment amenable to Russian interests – the classic objective of "active measures" – was apparent from interviews with one Nigerien at the time, who said that he "had to distance [himself] from everything

241. The Ministry of Foreign Affairs of the Russian Federation, Foreign Minister Sergei Lavrov's video message to the participants in the 3rd international youth forum Russia-Africa: What Next? Moscow, 24 April 2024, [link](#).

242. Kester Kenn Klomegah, Russia-Africa: What Next? Speakers question at the 3rd MGIMO University's Youth Forum, *Modern Diplomacy*, 30 April 2024, [link](#).

243. USAID, Niger Democracy, Human Rights, and Governance Fact Sheet, July 2023, [link](#).

244. Danai Nesta Kupemba, US troops to leave Niger by mid-September, *BBC*, 19 March 2024, [link](#).

245. Africa Center for Strategic Studies, Mapping a Surge of Disinformation in Africa, 13 March 2024, [link](#).

246. François Soudan, Mohamed Bazoum: "Armer les civils pour combattre les terroristes es tune tragique erreur", *JeuneAfrique*, 26 May 2023, [link](#).

247. ADF Staff, Russia Exploiting Niger Coup on Social Media, *Africa Defense Forum*, 19 September 2023, [link](#).

248. Jason Burke, Russia uses social media channels to exploit Niger coup, *The Guardian*, 27 August 2023.

because [he did not] know what's true and what's not."²⁴⁹

With Western efforts and reputation fatally discredited by the disinformation assault, the Kremlin moved to the second stage of an active measure campaign: providing security support to pro-Russian elements.²⁵⁰ After Kremlin-linked social media channels circulated posts proposing Wagner mercenaries as the emancipatory answer to Niger's instability, the junta took the bait and requested the paramilitary group's assistance in August 2023. These ties have endured beyond Prigozhin's death and Wagner's integration into the Russian military complex; last March, in the same month that the junta demanded an American withdrawal from the country, General Abdourahamane Tchiani spoke by telephone with Putin. The following month, Russia's African Corps arrived in Niger, and has reportedly started to build a new air defence system.²⁵¹

3.2.4: Conclusions on Russian 'Global South' Strategy

Although this section has focused on Africa as a case study, it would be wrong to conclude that the continent is the only target of Russia's systematic exploitation of the 'Global South' narrative. Last November, the US State Department reported that Moscow is "currently financing an on-going, well-funded disinformation campaign across Latin America", with operations identified in over 13 countries.²⁵² Unlike in Africa, where deep – and often unresolved – colonial legacies present an ideological lightning rod for Russian psychological operations, Russian messaging in the Americas seeks to exploit reservations about the local hegemon's pockmarked interventionist track record. Like Africa, the Kremlin "launder[s] its propaganda and disinformation through local media in a way that feels organic to Latin America."²⁵³

Some remain defiant regarding the prospects of Russian influence across the 'Global South'. One analyst points to stagnant Russian-African trade, and the limited executive-level attendance of last year's summit, as evidence of the inefficacy of Moscow's outreach across the continent.²⁵⁴ Another author reasons that Russian claims to champion a global counter-movement against an allegedly plunderous West are inviting "considerable irony and scepticism" across the 'Global South'.²⁵⁵ Elsewhere, the domineering role of the Ukraine War in Russia's grand narrative is said to be blunting its appeals to revolutionary camaraderie in the 'Global South'.²⁵⁶ These arguments all rest on the assumption that Russia's 'Global South' strategy should be judged on bloc-wide success – whether it is truly 'winning over' the community at the West's expense.

The problem is that such interpretations mistake the nature of Russia's engagement with the 'Global South', both in geographical and conceptual terms. There is a contradiction in Russia's approach to the 'Global South': on the one hand, it promotes the narrative in multilateral fora under the guise of a commitment to a multipolar order which respects regional and state sovereignty. On the other, Moscow regards, and engages with, the non Western-aligned world not as a homogenous community, but as a diverse battleground for influence and comparative advantage. In the

252. US Department of State, The Kremlin's Efforts to Covertly Spread Disinformation in Latin America, *Office of the Spokesperson*, 7 November 2023, [link](#).

253. Ibid.

254. Federico Rampini, Russia and China: aligning with the Global South, *Aspenia Online*, 4 February 2024, [link](#).

255. Vadim Grishin, Russia and the Global South, or the Mystery of Political Semantics, *George Washington University*, March 2024, 7.

256. Kadri Liik, From Russia with love: How Moscow courts the global south, *European Council on Foreign Relations*, 21 December 2023, [link](#).

249. Quoted in Olatunji Olaigbe, Disinformation Around Niger's Coup Falls in the Crosswinds of Geopolitics, *Inkstick*, 22 September 2023, [link](#).

250. Mark Galeotti, Active Measures: Russia's Covert Geopolitical Operations, *Marshall Center*, June 2019.

251. News Wires, Russian military instructors, air defence system arrive in Niger amid deepening ties, *France24*, 12 April 2024, [link](#).

words of Karaganov, “the heterogeneity of the ‘World Majority’ makes detailed universal recommendations impractical: each country needs an individual approach.”²⁵⁷ This disconnect between rhetoric and practice illustrates just how effectively – and brazenly – Moscow weaponises the ‘Global South’ device to compete with the West for influence and purchase across these contested regions.

For the time being, the West has not found a way to outmanoeuvre Russia in the battle of narratives. Until it does, the UK and its partners should neutralise Moscow’s advantage in this domain by rejecting the premise of this ideational competition altogether. This means disengaging from the struggle to ‘win over the Global South’, and focusing on the specific task of countering Russia’s methods of coercion, attraction and manipulation. At base, it means approaching non-aligned states as they are – independent actors driven by interests and threat perceptions – not as perennial hostages to historical grievances.

BRAZIL AND THE GLOBAL SOUTH

For several reasons, Brazil is the outlier of the group of contenders for military dictatorship, Lula has brought a particular world view to the leadership of the ‘Global South’. Firstly, it is the only non-Eurasian candidate, located remotely from the African and Asian contingent of the community. Secondly, it is not a major global power like China, and India (and, to an extent, given its nuclear arsenal and sizeable international presence, Russia), but rather a regional power. Thirdly, as the sole genuine democracy, it is the only one to have experienced a change in leadership during the term’s recent surge. Under the premierships of Luiz Inácio Lula da Silva and Jair Bolsonaro, there has been little consistency in Brazil’s engagement with the ‘Global South’, owing to their radically differing political inclinations. Each of these observations has implications for Brazil’s engagement with the concept and community of states.

Geography dictates that Brazil is removed from ongoing Eurasian upheaval, which is pitting the Western Alliance against the New Axis in a broad territorial, technological, economic and military contest.²⁵⁸ Nor does Brazil’s material power permit genuine aspirations to global power status, even if the leadership desired so. Instead, President Lula – Brazil’s staunchest proponent of the ‘Global South’ – views the concept through the lens of a structural rebalancing of power away from the West, and as a means of advancing progressive causes – such as promoting ‘Southern’ economic and climate causes, and pushing for greater Latin American representation in multilateral fora.

Lula’s embrace of ‘Global Southism’ can be traced to his personal political identity. A founding member of the leftist Workers’ Party, who had previously been imprisoned for being a union leader during Brazil’s

257. Sergei A. Karaganov et al., *Russia’s Policy Towards World Majority*, *Council on Foreign and Defence Policy*, 2023, 32.

258. Philip Zelikow, *Confronting Another Axis? History, Humility, and Wishful Thinking*, *Texas National Security Review*, vol. 7 (3), Summer 2024.

military dictatorship, Lula has brought a particular world view to the presidency. Indeed, it was only under his tenure that the Workers' Party broadened its inward-looking politics to the global stage.²⁵⁹ In essence, his international politics reflect his domestic inclinations. Thus, just as he launched the Fome Zero programme to eradicate hunger and extreme poverty in Brazil in 2003, he is now spearheading the Global Alliance Against Hunger and Poverty to do the same worldwide. Assuming the role of flag-bearer for the global underprivileged (the 'Global South') amounts to an extension of his domestic approach. In a sense, Lula embraces the ideological essence of 'Global Southism'.

Under the aegis of the 'Global South', Lula is a relentless advocate of global governance reform. During last year's second Voice of Global South Summit, he pledged that he would request greater representation of 'Southern' states during his country's presidency of the G20.²⁶⁰ He has already called for the G20 to offer the African Union (AU) membership,²⁶¹ and he has invited the AU and Mercosur states (the South American customs union) to the next G20 summit in Rio de Janeiro.²⁶² On other occasions, Lula has castigated the IMF and World Bank for the low representation, and punitive treatment, of 'Southern' states.²⁶³ He is also a frontrunner of the dedollarisation movement, particularly within the dais of the BRICS+ group. At last year's New Development (/BRICS) Bank summit in Shanghai, he railed against the dollar-based financial system, asking "who was it that decided that the dollar was the currency after the disappearance of the gold standard?".²⁶⁴

The same could certainly not be said for his predecessor, Bolsonaro. The former president trampled on many 'Southern' sacred cows. He preferred bilateralism to multilateralism, traditional values to liberalism,²⁶⁵ and – greatly influenced by the conservative philosophy of Olavo de Carvalho and the 'Olavistas' – expressed hostility towards globalism and the creep of Marxism into Brazilian society.²⁶⁶ Strikingly and indicatively, Bolsonaro made no trips to Africa during his four-year presidency, in contrast to Lula's visits to 21 African countries during his first two terms.²⁶⁷ Needless to say, Brazil showed little support to the 'Global South' narrative under Bolsonaro.

As Lula replaced Bolsonaro in 2023, Brazil is back in the 'Global South' game. The incumbent president sees the next few years as crucial to the cause, and at last year's BRICS summit he noted that "the presence of three BRICS+ members in the G20 troika will be a great opportunity to move forward on issues of interest to the 'Global South'".²⁶⁸ Across both presidents' eras, it is observable how personal political ideology has driven the rhetorical and diplomatic shift. It is also important to note the indissoluble linkage between geopolitics and 'Global Southism'; Lula may genuinely be driven by progressive ideals but, as interstate competition subsumes ostensibly apolitical issues, the two are converging. Indeed, as Lula's aversion to the Western order has developed, his Brazilian Workers' Party signed a bilateral with the CCP last year, agreeing to an

259. Shively Jacob et al., *Brazil's Changing Foreign Policy Ambitions: Lula, Bolsonaro and Grand Strategy Analysis in the Global South*, Núcleo de Pesquisa em Relações Internacionais da Universidade de São Paulo, 2022, 4.

260. Brazilian Government, Speech by President Luiz Inácio Lula da Silva at the second virtual Voice of Global South Summit, 17 November 2023, [link](#).

261. G20 Brasil 2024, At the African Union Summit, President Lula defends the entry of more countries from the continent as full members of the G20, 19 February 2024.

262. Brazilian Government, Lula invites Mercosur countries to act as partners in the G20, 7 December 2023, [link](#).

263. Brazilian Government, Speech by President Luiz Inácio Lula da Silva at the opening of the 78th UN General Assembly, 19 September 2023, [link](#).

264. Luiz Inácio Lula da Silva, quoted in Joe Leahy and Hudson Lockett, *Brazil's Lula calls for end to dollar trade dominance*, *Financial Times*, 13 April 2023, [link](#).

265. *Ibid.*, 10.

266. Beatriz Buarque, *How Brazil's far-Right 'active knowledge' industry supports Jair Bolsonaro*, *openDemocracy*, 10 March 2021, [link](#).

267. Chinedu Okafor, *Brazil's president calls for a renewed relationship with Africa*, *Business Insider Africa*, 24 August 2023, [link](#).

268. YouTube, *BRICS Summit 2023 LIVE*, WION, 22 August 2023, [link](#). The troika consists of the current (Brazil), previous (India), and next (South Africa) presidency, which also happens to represent three BRICS states.

exchange of strategic information between the two “strategic global partners”.²⁶⁹ It is increasingly apparent that Lula’s ‘Southist’ world view is one with Chinese characteristics.

3.3: Chinese Exploitation of the ‘Global South’ Narrative

There are both similarities and differences between Chinese and Russian approaches to the ‘Global South’.

Like Moscow, Beijing views the concept as a conduit through which to build a coalition against American predominance in global political and economic systems. Like Moscow, Beijing encourages the crystallisation of the ‘Global South’ identity on the international stage, and attempts to shape its various initiatives in line with its own agenda. However, unlike Moscow’s targeted low-cost pincer strategy, Beijing offers massive bilateral and multilateral economic inducements to generate a reservoir of dependency-based geopolitical loyalty, which it can call upon as needed – for example, to whip votes in the UN, or to pressurise countries to downgrade their support for Taiwan²⁷⁰. Unlike Moscow, China faces the acute challenge of squaring its self-professed ‘Southern’ identity as an emerging power with its aspiration to compete with American hegemony. And unlike for Moscow, the ‘Global South’ is not just an arena for Beijing’s geopolitical competition with the US, but for its mounting ‘South-on-South’ rivalry with New Delhi.

Perhaps the most significant point of distinction between the two is that – until very recently – China refused to adopt the label altogether, due to mistrust over the ulterior motives of its proponents. It was only in the second half of 2023 that the CCP appeared to experience a Damascene moment, and began to present China as a champion of a community of developing, ‘egalitarian’ states. As we shall see, this rhetorical shift has not yet preceded any new form of engagement with ‘Southern’ states. Rather, the CCP has continued the blend of geoeconomic, geopolitical and diplomatic activities it started in the 2000s, which are all designed in line with its objectives in Sino-American strategic competition. From the Chinese perspective, the ‘Global South’ merely amounts to a new – still somewhat non-committal – soundbite to bat away allegations of neo-imperialism, and to stem the loss of influence to India and other would-be ‘Southern’ champions.

3.3.1: Chinese Activities in the ‘Global South’

Before we come on to analyse China’s evolving treatment of the concept of the ‘Global South’ over the last year or so, it is important to appreciate the extent to which this has not yet been accompanied by a substantive change in policy. Only then does it become clear that China’s adoption of the term and attendant ideological lens is simply a case of window dressing: a transparent attempt to conceal the increasingly obviously scale of its global geopolitical ambitions across Africa, Asia and Latin America. Furthermore, the CCP hopes that, by reframing its international megaprojects with ‘Southist’ cooperative and egalitarian themes, it can

270. Cindy Wang, China Steps Up Taiwan Isolation After Election, Peeling off Ally, *Bloomberg*, 15 January 2024, [link](#).

269. Cédé Silva, Ruling parties in Brazil and China sign cooperation agreement, *The Brazilian Report*, 21 September 2023, [link](#).

more seriously challenge Western alternatives.

The CCP has two overarching geopolitical objectives in the 'Global South': geoeconomic and diplomatic. These will be treated in turn.

The CCP's expansionary ambitions were first unleashed in 1997 with President Jiang Zemin's "going out" policy,²⁷¹ which instigated a wave of Chinese investment and influence across the 'Global South'.²⁷² As China's voracious demand for growth drove an inevitable clash with the US for market access and raw materials, 'Southern' states soon became a geopolitical battleground, rather than merely a target of deepening global economic linkages. It is therefore impossible to understand China's 'Global South' strategy properly unless it is placed within the context of Sino-American competition, and Beijing's aspiration to supplant the latter as the predominant global power.

Today, there are three pillars of Chinese economic statecraft across the 'Global South': challenging US-led financial institutions' stranglehold on development governance and assistance; eroding the primacy of the dollar and the American financial system; and competing for industrial might during and after the green transition. Obtaining a critical mass of engagement and influence with the 'Global South' is essential to each of these, if China is to usurp the US.

Since the "going out" policy, Beijing has launched a number of bilateral and multilateral initiatives over the past two decades to provide loans and investment for infrastructural and industrial projects across Asia, Africa, Europe and Latin America: the China-Africa Cooperation Forum (2000), the China-Arab Cooperation Forum (2004), the China-Community of Latin American and Caribbean States Forum (CELAC), the BRI (2013), the Silk Road Fund (2014), and the AIIB (2016). Although the specific tactical objectives of each vary, the strategic ambition is uniform: to insert China as the critical partner in these states' socioeconomic development, ultimately strengthening its position in the international order at the expense of the West.²⁷³ Beijing coins this relationship "win-win cooperation"²⁷⁴ to generate allure amongst the developing world at the prospect of 'no strings attached' aid, playing on existing grievances associated with loans from Western institutions.

As Chapter II showed, reality has caught up with this utopian vision, forcing Beijing to recalibrate its development approach in recent years. In the period immediately before China's adoption of 'Global Southist' rhetoric, there was a huge a drop-off in outgoing Chinese investment, triggered by growth slowdown and a laboured recovery from the COVID-19 Pandemic. On top of this, Chinese state banks remain intransigent in the face of requests for debt restructuring, which elicited pushback from distressed recipients. Last year, Zambia's Finance Minister railed against Beijing's insensitivity, and the glacial pace of debt negotiations. Even when a deal was finally struck, China provided no debt reduction of principal, and even insisted on a caveat by which its banks could claim higher payments in the instance of stronger Zambian economy recovery.²⁷⁵

Whether one ascribes this mushrooming debt distress to intentional

271. Jiang Zemin, Speech at the 16th Party Congress, 2002, [link](#).

272. For more on the 'Global South' and the "going out" policy, see Jeremy Garlick, *Advantage China: Agent of Change in an Era of Global Disruption*, (London: Bloomsbury, 2024).

273. Marcin Przychodniak, China Embracing a Global South Strategy, *PISM*, March 2024 43 (2351), 1.

274. Wang Yi, "Win-Win Cooperation", 7 March 2024, [link](#).

275. Joseph Cotterill, Zambia says it has signed debt restructuring deal with China and India, *FT*, 24 February 2024, [link](#).

'debt trap diplomacy', or merely Chinese mismanagement, it is a mistake to view this tension as an indication of overall strategic failure. Development assistance is not a means of achieving the altruistic end of sponsoring global prosperity,²⁷⁶ but rather a means of enhancing Chinese agency in the global economic system. Within this context, growing dependence on Chinese finance and debt forgiveness is a beneficial outcome. To this end, China has recently started to demand preferred creditor status over Western financial institutions, signalling again its desire to re-write the international economic system to its benefit.²⁷⁷ As China's development assault has unleashed these structural shifts, it has assumed an active global creditor role previously reserved to Western financial institutions.

The second component of Chinese economic statecraft in the 'Global South' is its eventual desire to supplant the dollar as the predominant global currency. Beijing has long promoted the renminbi as an alternative trade and loan currency, for both geopolitically and economically derived reasons. In 2015, it launched the Cross-Border Interbank Payment System (CIPS), which has risen from settling \$75bn-worth of transactions in the fourth quarter of 2015, to \$4.6tn in the third quarter of 2023.²⁷⁸ Meanwhile, China was less successful in enforcing renminbi denomination for BRI debts, due to advantageous short and long-term borrowing terms for the dollar. One major shortcoming of the attempt to replace the dollar with the renminbi is that the latter is not freely convertible, due to Chinese capital controls. Thus, foreign ownership of the currency is ultimately at the mercy of government oversight of Chinese banks.

BRICS+' growing momentum towards a dedollarisation agenda has presented Beijing with the opportunity to link its 'Global South' strategy with this objective. Following its recent expansion, BRICS+ now resembles a dollar-sceptic club: Iran and Russia are subject to Western sanctions and barred from the SWIFT international payment system; Ethiopia, South Africa and Egypt suffer destabilising dollar shortages; and India and the UAE regularly look to circumvent dollar exclusivity in the oil market.²⁷⁹ Discussions have mounted about the prospects of a BRICS currency, although the current course of action is limited to increasing intergroup payments in the 'R5' – the constituent currencies (renminbi, ruble, rupee, real, and rand).

Progress has been slow for myriad reasons, but it is at least symbolically relevant that Egypt issued renminbi denominated bonds for the first time last October.²⁸⁰ The potential efficacy of this combination was discernible in Tunisia and Algeria's (unsuccessful) applications to join BRICS, which were premised on their interest in dedollarsation – owing to the former's imploding economy and dollar shortages, and the latter's historically informed desire for sovereignty.²⁸¹

For the time-being, dedollarisation remains a distant aspiration rather than an imminent prospect. However, Beijing has seized on common interest to deleverage the dollar by offering the renminbi as the group's cross-border payment currency of choice, given the variable weakness of the other currencies as a suitable candidate. At the 2023 BRICS Summit,

276. For example, see China's State Council Information Office, China's International Development Cooperation in the New Era, 11 January 2021, accessed via [link](#).

277. FitchRatings, China's Stance on Multilateral Debt Relief Could Weaken MDBs' Preferred Creditor Status, 4 April 2023, [link](#).

278. Ibid.

279. Robert Greene, The Difficult Realities of the BRICS' Dedollarization Efforts – and the Renminbi's Role, *Carnegie Endowments*, 5 December 2023, [link](#).

280. Egypt sells 3.5bln yuan in 3-year panda bonds in debut issue, *Reuters*, 16 October 2023, [link](#).

281. Thomas Hill, China's de-dollarisation message finds a receptive audience in North Africa, *Atlantic Council*, 13 December 2023, [link](#).

President Xi Jinping declared that the group must “fully leverage the role of the New Development Bank, push forward reform of the international financial and monetary systems, and increase the representation and voice of developing countries.”²⁸² This somewhat euphemistic position on the full fragmentation of the global financial system largely owes to the economic damage that China itself would experience, given the hundreds of billions in US Treasury bonds and trillions-worth of dollar-denominated assets it currently holds. That said, it is clearly using the avenues of various ‘Global South’ initiatives to test the waters and place strain – where it can – on American dominance in this domain.

The second aim of China’s multidecadal ‘Global South’ engagement is to attract support on the global stage for its alternative vision of global governance. This can manifest in three ways: voting conformity in the UN; membership of, and engagement with, Chinese global initiatives; and scuppering Western coalition building.

In 2013, Xi expounded his goal of “building a community with a shared future for humanity”,²⁸³ which drew on a long heritage of the CCP’s rhetorical commitment to common prosperity and interstate egalitarianism on the global stage.²⁸⁴ Xi codified and elaborated on this concept at the 2018 Central Foreign Relations Work Conference, when he unveiled the CCP’s new ideology of “diplomacy of socialism with Chinese characteristics”. The stated aim of this ideology is for China to “lead the reform of the global governance system with the concepts of fairness and justice.”²⁸⁵ In the subsequent years, China has sought to achieve this tectonic shift by imposing its own norms and foreign policy nostrum upon the UN more forcefully.

To do so, Beijing has built leverage in the UN to enlarge its influence, set and determine the multilateral agenda. It does so with four footholds: increased funding for the organisation; campaigning for executive-level personnel appointments; whipping votes in the UN General Assembly; and promoting PRC-specific discourse in UNSC resolutions.²⁸⁶ The intersection between China’s approach to the UN, and its geopolitical objectives, is the desire to obstruct the formation of Western-backed criticism lobbies against China’s internal human rights record, and external political meddling in the Indo-Pacific region. In short, China petitions the ‘Global South’ for silence on issues deemed critical to its national security.²⁸⁷ More recently, the CCP has begun to supplement its UN norm setting agenda by sending party officials to ‘Southern’ states to offer leaders ‘training programmes’, which preach the Chinese authoritarian governance model and disseminate Sinophilic attitudes.²⁸⁸ The ultimate goal of these efforts is to coalesce a critical mass of sympathetic – or, at least, acquiescent – states by which to overwhelm any Western-driven campaigns against China’s internal oppression, or external aggression. This ‘amoral crusade’ channels the CCP’s diplomatic initiatives at the UN-level alongside the economic inducements detailed above.

Analysis of voting records is an inherently murky endeavour, given the complex array of factors which determine each state’s behaviour.

282. Xi Jinping, ‘Remarks by Chinese President Xi Jinping at the 15th BRICS Summit’, *Xinhua News Agency*, 23 August 2023, [link](#).

283. Xi Jinping, ‘A community with a shared future for mankind’, 23 March 2013, [link](#).

284. Zhou Xin, ‘China Focus: China pursues world peace, common development in international agenda’, *XinhuaNet*, 2 March 2018, [link](#).

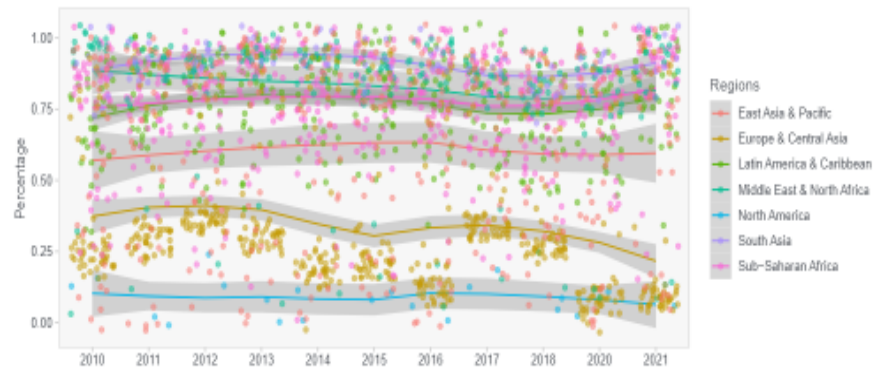
285. Xi Jinping speech, 2018 Central Foreign Relations Work Conference, cited in Hon Kevin Rudd, ‘Xi Jinping, China and the Global Order’, 26 June 2018, 8.

286. Courtney J Fung and Shing-hon Lam, ‘Mixed report card: China’s influence at the United Nations’, *Lowy Institute*, 18 December 2022.

287. Matt Pottinger and Mike Gallagher, ‘No Substitute for Victory’, *Foreign Affairs*, 10 April 2024, 10.

288. Niva Yau, ‘A Global South with Chinese characteristics’, *Atlantic Council*, 13 June 2024, [link](#).

Nonetheless, it is striking to note how ineffective Chinese efforts to shape conducive UN voting habits were in the last decade; voting conformity on human rights between China and the Asian, African and Latin American blocs did not markedly increase between 2015 and 2022.²⁸⁹



Conformity of UN General Assembly human rights resolutions between China and regional blocs. [Source](#)

That said, it is important to bear in mind that official votes do not reveal the extent of China’s unorthodox influence-gaining methods in the UN. Beijing engages in aggressive ‘corridor lobbying’ around votes,²⁹⁰ which includes reaching transactional ‘vote for vote’ deals with target states, and leveraging its seat on the UN Economic and Social Council Committee on Non-Governmental Organisations to block accreditation for NGOs perceived as likely to be critical of Chinese actions.²⁹¹ Chinese diplomats also have a predilection for ‘behind-closed-door’ dialogue with like-minded states around votes. For example, in July 2019, 22 UN member states issued a letter expressing concerns about human rights abuses in Xinjiang. Days later, 37 countries – all bar one of which score below the median on the Liberal Democracy Index – posted a counter-letter heralding “China’s remarkable achievements in the field of human rights.”²⁹² Finally, there is evidence that Beijing leverages the appointment of its representatives to UN leadership positions to promote its geopolitical allies, thereby ensuring mutually-beneficial resolution wording.²⁹³

It is too early to assess whether the introduction of ‘Global Southism’ into China’s lexicon has improved the effectiveness of its diplomatic campaign, but a shift in emphasis is already noticeable. As the BRI ran into double trouble – financial strain and allegations of imperial aggrandisement – China launched a series of linguistically sanitised parallel initiatives: the Global Development Initiative (GDI, 2021); the Global Security Initiative (GSI, 2022); and the Global Civilisation Initiative (2023). This provides an avenue for centralising China’s economic-diplomatic strategy more coherently around the ‘Global South’.

Indeed, this appears to be the CCP’s future direction of travel. Just as

289. Cortney J Fung and Shing-hon Lam, Mixed report card: China’s influence at the United Nations, *Lowy Institute*, 18 December 2022.

290. For more on this, see Alexander Dukalskis, A fox in the henhouse: China, normative change, and the UN Human Rights Council, *Journal of Human Rights*, 2023 22 (3), 334-350.

291. Rana Siu Inboden, China at the UN: Choking Civil Society, *Journal of Democracy*, July 2021 32 (3), 124-135.

292. Yamei, Spotlight: Ambassadors from 37 countries issue joint letter to support China on its human rights achievements, *XinhuaNet*, 13 July 2019, [link](#).

293. Shing-hon Lam and Courtney J Fung, Mapping China’s Influence at the United Nations, *Political Economy of International Organisation*, 30 September 2021, 1-41.

Xi announced a scaling back of BRI investment projects at last year's Third BRI Forum,²⁹⁴ the government released a White Paper titled "A Global Community of Shared Future: China's Proposals and Actions".²⁹⁵ The White Paper centralises the GDI, GSI and GCI as the engine of China's mission to "guide the advance of human society" as the "cornerstone for building a global community of shared future" – making sure to emphasise that it is "the largest developing country in the world and a member of the Global South."²⁹⁶ A few months later, China hosted a Global South Think Tank Dialogue on 'Global South: Working Together to Advance Modernisation, a clear response to India's Voice of Global South initiative.'²⁹⁷ This is the clearest signal of how Beijing will seek to fold its geostrategic endeavours into a diplomatic crusade across the 'Global South'.

3.3.2: The Role of the 'Global South' in Chinese Ideology Pre-2023

Until last year, China engaged strategically with the 'Global South' without adopting the label itself. In fact, the CCP was notably suspicious of the term's rising popularity. One professor at a state-sponsored Chinese university observed how, initially, Beijing perceived the concept as an Indian Trojan Horse for challenging Chinese influence across Asia, Africa and Latin America.²⁹⁸ There were also suspicions that the invisible hand of America was involved in the brewing battle for 'Southern' leadership; the Director of the Peking University-affiliated Institute for Global Cooperation and Understanding has alleged that the US "has been cozying up to... India, in an attempt to alienate China from the Global South."²⁹⁹

China's instinctive mistrust about the geopolitical undercurrents driving both Indian and Western adoption of the narrative led to numerous diplomatic flashpoints. In January 2023, India galled the Chinese government by excluding it from the first Voice of Global South Summit, which convened leaders and ministers from 125 countries across Africa, Asia, the Americas, and even Serbia and Bosnia and Herzegovina.³⁰⁰ Several months later in May, state-affiliated Chinese media accused the Hiroshima G7 Summit – when members pledged to enhancing cooperation with the 'Global South' in multiple press conferences and read-outs – of being an "anti-China workshop".³⁰¹ For Beijing, the central role of New Delhi in these initiatives laid bare its rival's patent geopolitical agendas. Neither was the West spared from such allegations, as Ministry of Foreign Affairs official Wu Hailong railed against the West's cynical "attempt to use the concept of 'Global South' to divide and weaken the camp of developing countries."³⁰²

The *volte face* in China's approach occurred very suddenly after that. The initial pivot came in June 2023, when de facto Foreign Minister Wang Yi stated at the first High-Level Conference of the Forum on Global Action for Shared Development that "China is naturally a member of the Global South."³⁰³ A few weeks later, Wang unveiled "Four Proposals on Strengthening Cooperation Among Global South Countries", which referenced the community eight times in seven short paragraphs.³⁰⁴ This dramatic shift reached a crescendo one month later at the Closing

294. Xi Jinping speech, Building an Open, Inclusive and Interconnected World for Common Development, Belt Road Forum, 18 October 2023, [link](#).

295. Chinese State Council Information Office of the People's Republic of China, September 2023, published *China Daily*, 26 September 2023, [link](#).

296. Ibid.

297. International Department Central Committee of CPC, Global South Think Tank Dialogue Held, 6 November 2023, [link](#).

298. Zhang Jie, India's Strengthening Relationship with the Global South: Strategic Ambitions and Constraints, CSIS, 15 January 2024, [link](#).

299. Ni Feng, US all-round strategic competition with China has taken shape, *China Daily*, 29 April 2024, [link](#).

300. Indian Ministry of External Affairs, 1st Voice of Global South Summit 2023, [link](#).

301. Global Times Editorial, G7 has descended into an 'anti-China workshop', *Global Times*, 22 May 2023, [link](#).

302. Kawashima Shin, How China Defines the 'Global South', *The Diplomat*, 11 January 2024, [link](#).

303. China International Development Cooperation Agency, Wang Yi: China naturally member of Global South, 12 July 2023, [link](#).

304. Chinese Ministry of Foreign Affairs, Wang Yi Puts Forward Four Proposals on Strengthening Cooperation Among Global South Countries, 26 July 2023, [link](#).

Ceremony of the BRICS Business Forum 2023, when Xi referred to China “as a developing country and a member of the Global South.”³⁰⁵ In the space of two months, Xi had discovered that, after all, “China breathes the same breath with other developing countries and pursues a shared future with them.”³⁰⁶

3.3.3: The Role of the 'Global South' in Chinese Ideology Post-2023

How do we explain such a radical rhetorical shift, and what does it tell us about the role of the 'Global South' within Chinese grand strategy? Casting a look back to Wang's “Four Proposals”, Beijing posits four pillars of cooperation with the bloc: eliminating conflicts and peace-building; promoting development through revitalisation; an inclusive and respectful vision of common progress; and unity underpinned by equitable representation on the world stage.³⁰⁷ Xi synthesised these strands into a single coherent vision of symbiotic ‘Southern’ partnership at the 2023 BRICS Business Forum, reasoning that “what people [in the Global South]... long for is definitely not a new Cold War”, but rather “an open, inclusive, clean and beautiful world that enjoys enduring peace, universal security and common prosperity.”³⁰⁸ China now presents itself as indivisibly joined to other states by shared historical experiences of colonial legacies, and existing Western-imposed structural injustices.³⁰⁹

Still, none of this messaging would have been out of place pre-June 2023, when China oversaw colossal development projects worldwide, and railed against American control of the global order, without activating the 'Global South' narrative.

The shift is thus best explained not as an adjustment of Chinese foreign policy and strategy, but as a reaction to three developments. These have all worsened Beijing's diplomatic position in the 'Global South', and so raised the urgency of tapping tap into the emotive appeal of the narrative.

Firstly, as has been noted, Chinese development finance to the 'Global South' has dried up in recent years, owing mostly to the country's economic malaise. On top of this, poor management of BRI projects, together with Beijing's punishing intransigence in the face of requests for debt restructures, has dampened the former allure of Chinese development assistance. As the money no longer walks as it used to, the CCP is talking up its 'Southern' identity more to curry favour amongst developing countries (and to make up for its diminished financial leverage). Pre-existing development vehicles have therefore been re-cast as 'Global Southist' endeavours – a case of pouring old wine into new bottles. As one academic at the Ministry of Foreign Affairs-administered China Institute of International Studies says, this reframing is all the more urgent due to the West's “effort to counter the China-proposed BRI” with its own initiatives,³¹⁰ including the G7's Build Back Better World (B3W, 2021) and Partnership for Global Infrastructure and Investment (PGII, 2022), and the EU's Global Gateway Strategy (2023).

Secondly, China views the emergence of other 'Global South' leadership candidates as a threat to its own influence. India is the main competition,

305. Full text: Xi Jinping's speech at the Closing Ceremony of the BRICS Business Forum 2023, CGTN, 23 August 2023, [link](#).

306. Ibid.

307. Wang, 2023.

308. Xi's speech at BRICS Business Forum, 2023.

309. Marcin Przychodniak, China Embracing a Global South Strategy, *PISM*, March 2024 43 (2351), 1.

310. Yuan Sha, G77+China to Play a Bigger Role in the Global South Agenda, *China Institute of International Studies*, 18 September 2023, [link](#).

having turned 'south-south' financing into a direct contest for influence with China in Asia, and having announced itself as the 'Southern' champion by hosting the Voice of Global South summits. Meanwhile, Russia increasingly competes for the ear of Africa and Latin America. With both rivals frontloading the 'Global South' narrative as a sort of effect amplifier – with some success – Beijing is under pressure to follow suit, or else risk being pushed out of 'the club'. It is notable that, eight months after India excluded China from the first Voice of the Global South Summit, Beijing partook in the G77+China meeting. Attendant heads of state adopted the Havana Declaration, which *inter alia* committed to greater "South-South" cooperation in science, technology, and innovation.³¹¹ More recently, China hosted an incredibly successful ninth Forum on China-Africa Cooperation (FOCAC), which was attended by 51 African heads of state (more than spoke at the UN General Assembly last month). The Forum saw Beijing unveil \$50.7bn in credit lines and funding and, indicative of its sharpening geopolitical focus on the continent, the elevation of 30 states to 'strategic partner' status.³¹²

Thirdly, as the parameters of Sino-Western competition expand across the globe, China's newfound commitment to 'Global South' solidarity is intended to deflect allegations of imperial aggrandisement. The state-aligned foreign policy community has recently become preoccupied with what it views as American efforts to undermine China's diplomatic overtures to 'Southern' states. One senior official at the China Institutes of Contemporary International Relations – a cover identity of the Chinese Ministry of State Security – remarked that the US and its allies "have distorted the concept [of the 'Global South'] first by saying that China is not a developing country and then by attempting to exclude China from the Global South."³¹³ As the West increasingly seeks to exploit the inconsistency between China's dual 'developing' and 'aspiring hegemon' status, Beijing emphasises its 'Southern' identity as a diplomatic counter-measure. During his BRICS Business Forum speech last year, Xi felt it prudent to address this pointedly, claiming that "hegemonism is not in China's DNA; nor does China have any motivation to engage in major-power competition."³¹⁴ This somewhat over-compensatory (and entirely fallacious) statement is demonstrative of his eagerness to re-establish China's former reputation as a constructive and apolitical power in global affairs.

China's 180° turn on the 'Global South' is therefore inseparable from its shifting geopolitical calculations across contested regions. Indeed, the inflection point is revealing of the strategic uncertainty with which Beijing views India's own successful 'Southern' diplomatic campaign, as well as Western attempts to outflank Beijing's massive global geoeconomic programme. China's tendency to conflate the two further exacerbates its threat perception; in the words of a researcher at the government-affiliated think tank Shanghai Institute for International Studies, "the United States supports India's emergence as a leader in the Global South in order to marginalise China's influence in the developing world".³¹⁵

311. UN Office for South-South Cooperation, G77 Havana Declaration Focuses on Science, Technology, and Innovation Ahead of UNGA, 28 September 2023, [link](#).

312. Ministry of Foreign Affairs the PRC, Foreign Ministers of the Co-Chairs of FOCAC Jointly Meet the Press, 6 September 2024, [link](#).

313. Li Yan, Where Did the Term "Global South" Originate?, *China US Focus*, 21 September 2023, [link](#).

314. Ibid.

315. Liu Zongyi, Liu Zongyi delivered a speech at the Baichuan Forum, discussing India's "Indo-Pacific Strategy", 3 January 2023, [link](#).

This paranoia would seem to overegg the degree of American-Indian collusion, and downplays the latter's fierce commitment to sovereignty and non-alignment in Sino-American rivalry. Nonetheless, it has led the CCP to reach for the same rhetorical device as the Kremlin in order to court 'Southern' states.

Despite these efforts, the formative role played by base geopolitical ambition exposes a central contradiction in China's approach to the 'Global South': that between professed commitment to the solidarity and equality of 'Southern' developing countries, and the aspiration of becoming, in the CCP's own words, "global leader in terms of composite national strength and international influence."³¹⁶ The CCP's initial hesitancy to utilise the 'Global South' narrative reveals its acknowledgement of this tension – more acute than in the case of Moscow which, due its relative power status, cannot truly vie for global hegemony. We should be under no illusion that China actually believes in the homogeneity of the 'Global South' community – or that it engages with its constituents as such. Instead, that China has retrospectively attached the 'Global South narrative' to its pre-existing activities across Asia, Africa and the Americas – without any substantive strategic modification – is yet more evidence of the cynical lip service paid by predatory states to the concept.

3.3.4: Conclusions on Chinese 'Global South' Strategy

China's geostrategic engagement with the 'Global South' long predates its dramatic reconciliation with the term itself. Moreover, the last twelve months have exhibited no substantive modification of the CCP's its foreign policy framework, nor of the ideological lens through which it analyses global dynamics. Beijing's newfound appeals to 'Global Southism' are thus intended to consolidate its pre-existing geopolitical objectives in an increasingly contested 'Southern' environment – either by exploiting common desires for economic and global governance reform, or depressing the prospects of Western-mediated, anti-Chinese coalitions. Herein lies the sheer cynicism of China's commitment to the 'Global South' agenda, which constitutes a rhetorical veneer for naked geopolitical ambition.

316. Embassy of the People's Republic of China in Georgia, China Focus: CPC speeds up modernisation drive toward "great" socialist China, 19 October 2017, [link](#).

Chapter IV: 'Global South' In Western Policy

Despite these ideological, intellectual, and strategic perils, the 'Global South' is surging as a guiding principle for Western policy. Paradoxically, the less the paradigm resembles economic and political reality, the more it is being used. The most pernicious aspect of this trend is the dearth of critical engagement with the framework in the West.

Indeed, Carl Oglesby floated the 'Global South' as a soundbite in 1969, but it was only decades later that the term made the transition from fringe political intellectual circles to policymaking. Even after the Brandt Report, the new binary model made slow progress into the mainstream of development thinking; it would take another 20 years for this framework to be formalised in the UN's Millennium Development Goals. Goal Eight, "To Develop a Global Partnership for Development", proposed a novel covenant between 'North' and 'South' based on fair trade, aid, debt release and technology transfer.³¹⁷ Nevertheless, discomfort with the concept is visible in the UN's subsequent methodology. On the one hand, the 2015 Sustainable Development Goals eschewed the categorisation of the world into two halves, preferring instead to focus on universal "global development".³¹⁸ On the other hand, UNCTAD still presents its data along the 'Global North' and 'Global South' distinction.³¹⁹

4.1: Academic Discourse

Despite this ambiguity within the very institution which first formalised the 'Global South', the term has been adopted at an accelerated rate across Western academia and, increasingly, at the governmental level. As was the case for the rise of developmentalism throughout the 20th century, the driving force of this movement is the fields of development economics, and postcolonial studies. For quite obvious reasons, the assimilation of the 'Global South' into a field of academic study with virtually no regard for its intellectual history, nor inextricable geopolitical dimension, poses an enormous problem. If carried to its conclusion, it would destroy any critical analysis of the relation of the so-called 'Global South' to the real world.

Unfortunately, this appears to be the direction of travel in British academic institutions. In the main British universities with specific 'Global South' study initiatives, the field is now the exclusive preserve of developmental studies departments. The University of Oxford has two departments with 'Global South' programmes. The first is the Department

317. UN, Millennium Development Goals and Beyond 2015, [link](#).

318. UNDP, What are the Sustainable Development Goals?, [link](#).

319. UNCTAD, UNCTAD releases Handbook of Statistics 2023, 14 December 2023, [link](#).

of International Development which, obviously, confines the concept to the lens of developmental studies. The department's main page refers to development as "an inherently political process", and marshals its "internationally recognised strength in... particular areas of the global South" towards a focus "on analysis from the vantage point of the disadvantaged".³²⁰

The second Oxford department is the Blavatnik School of Government, whose cross-disciplinary approach to political science might raise hopes of a critical, historically-informed assessment of 'Global Southism'. However, the department's sole programme which pertains to the 'Global South' is the 'Global Economic Governance Programme', launched in 2003 and which "fosters research and debate on how to make the global economy inclusive and sustainable."³²¹ The programme is currently running a three-year project, "Strengthening Non-state Climate Action in the Global South (Climate South)", a flavour of which can be ascertained by its funding from the Wellcome Trust (which controversially closed an exhibition on medicine in London for its "racist, sexist and ableist theories and language").³²² Across both departments, therefore, there is a striking lack of critical engagement with 'Global Southism' – not least its historical political and contemporary instrumentalisation.

Meanwhile, the University of Cambridge has launched a new Consortium for the Global South, which is co-run by the Centre of African Studies, Centre of Development Studies, Centre of Latin American Studies, and the Centre of South Asian Studies.³²³ As part of its activities, the Consortium hosts the 'Decolonising the Curriculum Faculty Initiative', and last year one of its associated fellows partook in a seminar festival titled 'Why we need to understand the Global South in order to solve the big global issues of today.'³²⁴ It is notable that none of the three speakers had a background in history or international relations, but exclusively in development studies and postcolonial studies.

The London School of Economics' Global South Unit is no better. The Unit's two flagship programmes, the 'Global South and China Programme' and the 'Sustainable Development Initiative', all play on traditional developmental tropes. While occasional papers do point towards granular questions of domestic politics in identified Global Southern states, they generally avoid any real grappling with the geopolitical questions at play.³²⁵ In any case, it is unclear why this research initiative requires its own independent unit – which does not engage in any robust critique of its titular framework – and cannot simply be incorporated in wider international relations studies.

4.2: Western 'Global South' Policy

It is unfortunate that such an uncritical and uncontextualised, approach to the 'Global South' now pervades British academia. It is more consequential, however, that the term has grown in significance as a framing device for Western policy. In October 2022, the devolved Scottish Government held its inaugural Global South Panel, whose aim is to provide "a wider and

320. University of Oxford Department of International Development, Overview, [link](#).

321. University of Oxford Blavatnik School of Government, Global Economy Governance Programme, [link](#).

322. Rachel Russell, Wellcome Collection closes 'racist, sexist and ableist' Medicine Man display, BBC, 27 November 2022, [link](#).

323. University of Cambridge, Consortium for the Global South, [link](#).

324. University of Cambridge, Why we need to understand the Global South in order to solve the big global issues of today, Alumni Festival, 23 September 2023, [link](#).

325. LSE, Global South Unit: Publications, [link](#).

morse diverse range of voices and experience, and lend expertise” to government international development strategy.³²⁶ The Panel, which takes place biannually, aligns with the Scottish Government’s “commitment... to inclusivity and diversity, and to shifting power in our international development work to our partner countries.”³²⁷ Minutes from the first Panel reveal the tone of the endeavour – there is, of course, no mention of Russian and Chinese activity in the ‘Global South’; but a government representative did express the desire to “decolonise” Scottish policy.³²⁸ The January 2023 Panel built on this theme with a discussion on “Shifting the Power, Decolonisation, and Localisation in International Development”.³²⁹ It is noteworthy that the only critical opinion on this issue was voiced by a Rwandan academic, who noted that decolonisation as a term “felt backward looking, referring to historic events which many countries in the Global South had moved on from.”³³⁰

Across the Channel, France – alongside Barbados – hosted the “Summit for a New Global Financial Pact” last June, which President Emmanuel Macron charged with focusing on “all the means and ways of increasing financial solidarity with the Global South.”³³¹ Then French Foreign Minister Catherine Colonna surpassed this ambition by announcing that the summit would “build a new contract with the North and the South.”³³² France succeeded in getting 43 countries to support the subsequent Paris Pact for People and the Planet.³³³



326.Scottish Government, International development: Global South Panel, [link](#).

327.Scottish Government, International development: Global South Panel – terms of reference, 15 March 2023, [link](#).

328.Scottish Government, International development: Global South Panel minutes – October 2022, 15 March 2023, [link](#).

329.Scottish Government, International development: Global South Panel minutes, January 2023, 15 March 2023, [link](#).

330.Thierry Uhawenimana, *ibid*.

331.Focus2030, Summit for a new global financing pact: Towards more commitments to meet the 2030 agenda?, 9 June 2023, [link](#).

332.*Ibid*.

333.Pact De Paris, Paris Pact for People & The Planet, [link](#).

Given the summit’s aspirations to establish a new development finance covenant between ‘North’ and ‘South’, the absence of Russia and China – who both purport to champion the ‘Global South’ agenda – would seem to have undermined the credibility of this bid for universal buy-in. Furthermore, if the summit was meant to erect the foundations of a new paradigm for ‘North’-‘South’ relations, its ability to engage just 41 out of the 134 G77 countries must be judged a failure.

In any case, dressing a multilateral initiative up in the rhetoric of the ‘Global South’ cannot encourage individual states to disregard their particular interests and motivations for participating. One also wonders what the value of proactively initiating ‘Global South’ initiatives is, as opposed to undertaking bilateral relationships that account for specific issues: from a purely rational point of view, a former imperial ‘Global Northern’ country attempting to assemble a group of post-colonial ‘Global Southern’ countries is the equivalent of stacking the odds against itself. The inevitable outcome is either that no matters of real substance will be discussed, or such discussions will take place at an entirely self-incurred disadvantage – therefore doubling the chances of further disgruntlement.

4.3: British ‘Global South’ Policy Until Labour

The ‘Global South’ has until recently been confined to the policy documents of government departments involved in development (formerly DFID, now the FCDO) and aid-related non-department public bodies (NDPBs), such as UKRI and the British Council. From the 2000s until now, the ‘Global North-Global South’ model was not applied as an overarching framework for top-level British strategy – such as in either Integrated Reviews – nor in foreign policy White Papers. It is notable that even last year’s International Development White Paper omitted any mention of the ‘Global South’, favouring instead a regional approach.³³⁴ The nearest the document came to assuming this conceptual framework came in its commitment to leveraging UK private sector investment to support “southern-led” initiatives.³³⁵

A number of key development policy documents published in the last two decades include the ‘Global South’ as a reference point. In 2007, DFID issued a policy memorandum in which it declared that its approach to trade and development was to “make globalised markets work better for the poor”, including by investing resources into developing “South-South” trade.³³⁶ The document lacks any assessment of how these policies serve specific British interests overseas, beyond the implied benefits from nurturing new markets. In 2011, DFID, the Department of Energy & Climate Change, and DEFRA launched the UK International Climate Fund (ICF), which finances projects geared ‘Southern’ countries at risk from climate change.³³⁷ This thematic focus continued into last year, when the government launched its 2030 Strategic Framework for International Climate and Nature Action. The strategy – formulated by FCDO, DESNZ, and DEFRA – pledged to double the ICF to £11.6bn between 2021 and 2026.³³⁸ On this occasion, the ‘Global South’ was mentioned explicitly,

334. UK International Development, *International development in a contested world: ending extreme poverty and tackling climate change*, November 2023.

335. *Ibid.*, 123.

336. UK Parliament, Memorandum submitted by the Department for International Development (DFID), February 2007, [link](#).

337. HM Government, *UK International Climate Fund: Tackling climate change, reducing poverty*, *Department for International Development*, 2011, 5.

338. HM Government, *2030 Strategic Framework for International Climate and Nature Action*, March 2023, 5.

as the target of a new £110mn designated climate finance package, the CLARE Programme.³³⁹ Once again, there was no articulation of how our engagement with the 'Global South' could, or should, be informed by British material interests.

As policymakers have historically only engaged with the 'Global South' (as a concept) within the domain of international development, the effect has been to splinter British foreign policy into strands with distinct intellectual foundations. This is itself the relic of a post-Cold War trend in the West, whereby international trade and aid have come to be construed predominantly as vehicles of common prosperity under the aegis of free market economics, and no longer instruments of economic statecraft, or 'geoeconomics'.³⁴⁰

IN SPIRIT, IF NOT IN NAME: THE UK'S 'GLOBAL SOUTH' PARTNERSHIPS

Just as the UK has confined the 'Global South' to a framework for development policy, it has developed a range of economic and strategic partnerships with 'Southern' states. This runs entirely counter to the supposed 'North-South' paradigm.

Through the Commonwealth of Nations, the UK maintains political, institutional and people-to-people relations with 55 (mostly) former colonies. Membership of the Commonwealth is on a voluntary basis, and common objectives are laid out in the Singapore Declaration (1971), Harare Declaration (1991), and the Aso Rock Declaration (2003). The latter enshrines a commitment to "democracy, good governance, human rights, gender equality, and a more equitable sharing of the benefits of globalisation."³⁴¹ Although the organisation is mostly of symbolic value, Commonwealth citizenship affords those eligible a 'right of abode' in the UK, and the bloc makes up 9% of the UK's overall trade.³⁴²

The UK also sits on the intergovernmental forum of the G20 alongside a number of 'Southern' states. Between Argentina, Brazil, China, India, Indonesia, Mexico, Saudi Arabia, South Africa and Turkey, we have strong political and economic relationships with nearly all co-members. The UK enjoys growing political-security, economic and socio-cultural ties with 10 Southeast Asian states through its mission to ASEAN.³⁴³ On 16 July 2023, the British Government signed the Protocol of Accession to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). The 11 member states of the CPTPP represent 14% of global GDP, and is one of the world's largest free trade areas.³⁴⁴ Since 1971, the UK has committed to security consultations with Australia, New Zealand, Malaysia and Singapore – via the Five Power Defence Arrangements (FPDA) – in the instance that any member comes under threat or an armed attack. It is a lesser-known fact about this "quiet achiever"³⁴⁵ of minilateralism that it also provides grounds for cooperation across military exercises, maritime access, telecommunications systems, infrastructure development, and even postal services.³⁴⁶ And, of course,

339. CLARE Climate Adaption & Resilience, About, [link](#).

340. For more on the decline of geoeconomics, see Robert D. Blackwill and Jennifer M. Harris, *War by Other Means: Geoeconomics and Statecraft*, (Massachusetts: Harvard University Press, 2016).

341. The Commonwealth, Aso Rock Declaration on Development and Democracy: Partnership for Peace and Prosperity, 2003, [link](#).

342. House of Commons Library, Statistics on UK trade with the Commonwealth, 16 August 2024, [link](#).

343. HM Government, UK Mission to ASEAN, [link](#).

344. HM Government, Impact assessment of the UK's accession to the CPTPP, 17 July 2023, 15.

345. Carlyle A. Thayer, *The Five Power Defence Arrangements: The Quiet Achiever, Security Challenges*, 2007 3(1), 79-96.

346. Australian Treaty Series, Five Power Defence Arrangements 1971 No 21, [link](#).

Turkey is a NATO ally. Through these multilateral and minilateral initiatives – and, indeed, a whole litany of wider bilateral agreements – the UK has laid a strong wiring of economic and strategic partnerships across the 'Global South'. Many of these initiatives predate the term's creation, and long predate its recent renaissance. The notional divide between the 'South' and the West which the narrative asserts is entirely misinformed.

As a result, the 'Global South' as a collective entity has only existed in British policymaking as a target of largely altruistic initiatives, rather than as a grouping beholden to the usual logic of a competitive world order. This has given rise to the various principles and policies which now govern the UK's 'Global South' approach; other than platitudinous statements about the benefits of global trade, and collective interest in averting climate catastrophe, British policy has been devoid of a clear articulation of how engagement and relations with the 'Global South' serve specific policy objectives.

The point is not to question our commitment to humanitarian and climate change initiatives, the benefits of which need not be enumerated. However, it is striking how the UK has abandoned the previously held belief that aid and trade form an integral part of geopolitically-informed economic statecraft. Indeed, the view has taken hold in some development circles that the pursuit of national interests can be entirely counterproductive. For example, in an article posted on the FCDO-funded British Council's website in 2019, the author remarks that "it is important to consider the possible negative impact of being seen to pursue development assistance in a self-interested fashion – with the suspicion and loss of trust this would likely entail."³⁴⁷

The ramifications of artificially separating development from wider national strategy were masked in the 1990s and 2000s. During this period, the reconceptualisation of aid and trade – away from a form of economic statecraft towards a conduit for universal progress – was justified by two lines of argument: firstly, that these activities generate soft power which attracts wider strategic and ideological alignment between recipient and benefactor; and the globalist belief that, just as 'a rising tide lifts all boats', universal economic growth advantages all.

It is worth noting that development policy has struggled to achieve even the narrow strategic objectives listed above. The Independent Commission for Aid Impact, which evaluates British aid spending, is consistently damning about the gap between the ambitions and results of FCDO development initiatives. Last year, its review of FCDO aid programmes discovered "a period of strategic drift" between 2019 and 2023, the result of shifting goal posts and funding.³⁴⁸ A follow up review published this May ranked as "inadequate" four of the FCDO's five 'strategic' aid programmes, including peacebuilding, promoting democracy and human rights, aid to India, and aid to refugees in the UK.³⁴⁹ The reasons given were multitudinous, but some are particularly pertinent: peacebuilding suffers

347. Alasdair Donaldson, Development aid and national interests, *British Council*, February 2019, [link](#).

348. ICAI, Report: UK aid under pressure: a synthesis of ICAI findings from 2019 to 2023, 13 September 2023, [link](#).

349. ICAI, ICAI follow-up review of 2022-23 reports, May 2024, vi-vii.

from “a lack of strategic focus on [specific] countries”;³⁵⁰ government-led aid initiatives in India have been incapable of “shaping investment sufficiently”;³⁵¹ and, across the board, efforts in every regard frequently suffer from insufficient resources and manpower.³⁵²

Not only have these development initiatives proved largely ineffectual in terms of the limited strategic purpose assigned to them, but the very assumption – that this instrument of foreign policy is no longer a core component of economic statecraft – has been discredited. Decades of a relatively benign geopolitical environment obscured this fallacy, as the Western project of integrating the global community into a politico-economic order written in its name went unchallenged. However, the rise of China, with its alternative vision for this global system, has revealed the false assumptions which drove British aid and trade policy after the Cold War.

The CCP soft launched a geoeconomic agenda in 1997 with President Jiang Zemin’s “going out” policy. Initially driven by domestic economic imperatives, it has assumed a patently geopolitical impetus under the tenure of Xi. Thus, Beijing has formulated its global development agenda as part of a clear-eyed strategy which is underpinned by geoeconomic and geopolitical objectives in the context of Sino-American competition. By contrast, the UK has continued to view grand strategy and development as distinct. Nowhere was this more starkly revealed than in our decision to contribute over £3bn to China’s AIIB, rationalised by its developmental credentials.³⁵³ The AIIB has subsequently been accused of being a geopolitical arm of the Chinese state “dominated by Communist Party members”.³⁵⁴

This context matters for our assessment of the UK’s new approach to the ‘Global South’, due to the risk of imposing development principles on wider foreign policy. These principles cast national interests as a subsidiary priority, aside from those relating to climate change and the universal benefits of global trade. ‘Global Southism’, as both a concept and guiding principle, has thus taken hold without any critical engagement, and in isolation from other priorities of British statecraft.

The consequence of this strategic drift is that the UK has been left vulnerable to the return of economic statecraft as a crucial dimension of geopolitical competition. Instruments of British foreign policy – now essential to sustaining access to critical materials, overseas markets, and strategic relations – have been recast as wholly astrategic. The ‘Global South’ framework only exacerbates this strategic deficiency, as it is inherently insensitive to contemporary economic dynamics and interstate rivalry.

350.Ibid., vi.

351.Ibid., vii.

352.Ibid., 12.

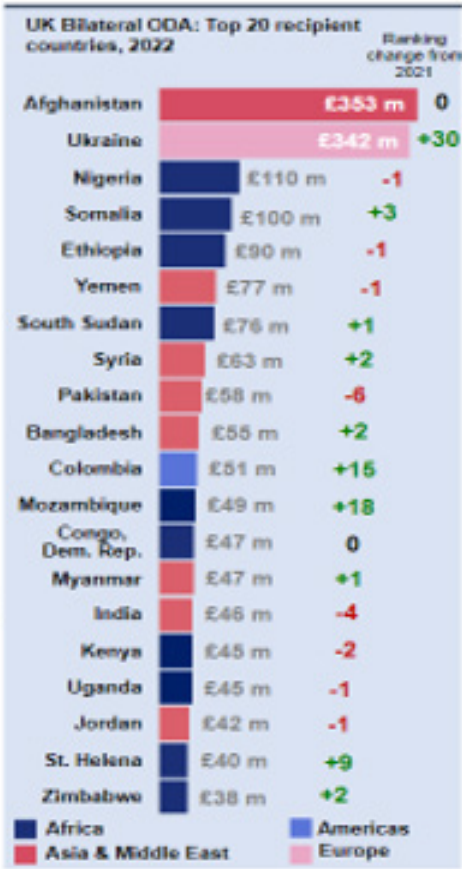
353.HM Government, Articles of Agreement of the Asian Infrastructure Investment Bank, 29 June 2015, 40.

354.Twitter, @BobPickard, twitter, 14 June 2023, [link](#). Unlike other multilateral development banks, such as the World Bank, China has refused to stand up a non-resident board, leaving it with a resident board exclusively made up of Chinese state representatives.

CURRENT UK AID TO THE ‘GLOBAL SOUTH’

For the most part, the UK does not formally frame its Overseas Development Assistance (ODA) as ‘Global South’-specific. However, the constituent regions nonetheless receive the lion’s share of British ODA, as per the OCED Development Assistance Committee’s criteria for ODA eligibility. Barring very few exceptions, all ODA-eligible countries are in the ‘Global South’. The OECD reported that the UK was the organisation’s fourth largest state aid donor globally in 2023 in absolute terms, behind the US, Germany, and Japan.

In 2023, the FCDO spent £9.5bn on ODA, up from £7.6bn in 2022.³⁵⁵ The largest regional recipient was Africa (52.4%), followed by Asia (30.8%).³⁵⁶ 75% of this is given as bilateral aid, and the remaining 25% goes towards the UK’s contribution to multilateral organisations, such as the World Bank International Development Association (IDA).³⁵⁷ The most recent available thematic and country breakdown for ODA is 2022. That year, the FCDO spent £3.7bn on programmes pertaining to refugees, £1.1bn on humanitarian aid, £1bn on health, and £1.5bn on cross-cutting civil society initiatives.³⁵⁸ The top recipients of bilateral aid were as follows:



[Source](#)

355.HM Government, Statistics on International Development: Provisional UK Aid Spend 2023, FCDO, April 2024, 6.

356.Ibid., 3.

357.Ibid., 10.

358.HM Government, Statistics on International Development: Final UK Aid Spend 2022, FCDO, [link](#).

The UK channels a sizeable portion of its ODA budget into 'Global South'-related programmes via NDPBs and other government aid initiatives. The FCDO gave £130mn as a grant-in-aid to the British Council in 2022/2023 which, according to the Council's website, facilitates development activities in "countries in Africa, the Middle East and South Asia."³⁵⁹ According to the British Council's website, its development work focuses on "enrich[ing] the quality of education", including by training English language teachers and supporting pedagogical reform.³⁶⁰ As mentioned, the FCDO and its Canadian counterpart run the CLARE programme. The FCDO provides 85% of the £110mn fund which goes towards climate resilience initiatives in Africa, Southeast Asia and the Pacific.³⁶¹

The aforementioned cross-departmental ICF³⁶² identifies Sub-Saharan Africa, south and southeast Asia, fragile and conflict affect states, and small island developing states as "key geographic regions".³⁶³ The ICF comprises the UK's main contribution (£9.8bn between 2011 and 2021, with £11.6bn committed for 2021-2026) to the \$100bn/year climate finance pledge made by developed countries in 2009.³⁶⁴ The ICF also seeks to mobilise private finance to complement public investment, by working with the Bank of England and British International Investment.³⁶⁵

BEIS received £554mn in ODA funding in 2022. £125mn of this is awarded to another NDPB, UKRI, which manages the Newton Fund and Global Challenges Research Fund – both of which award money to scientific and technological research projects tasked with climate mitigation.³⁶⁶ Between 2011/12 and 2022/23, BEIS also awarded £3.9bn to ICF, which facilitates a host of bilateral and multilateral climate mitigation projects as part of the UK's commitment to the Paris Agreement.³⁶⁷

The final department which commits significant aid funding (£524mn in 2022) to 'Global South'-orientated initiatives is the Department of Health and Social Care (DHSC).³⁶⁸ As part of the UK Aid Strategy, DHSC's flagship is the Global Health Security programme, which supports developing countries in disease prevention and vaccination through financing a panoply of multilateral organisations.

4.4: Labour's 'Global South' Policy

In some ways, Lammy's 'progressive realism' represents a welcome break from the previous approach of applying different frameworks to different elements of foreign policy. His decision to make 'Global South' engagement a pillar of all foreign policy means that, for the first time in decades, all branches of British statecraft are guided by the same conceptual framework and attendant world view. Rather than ringfence the 'Global South' as a paradigm which informs activities around poverty reduction, climate damage mitigation, and human rights, Lammy asserts that the West "must partner with the Global South" as a rule of engagement on all

359. British Council, 2022-23 Annual Report and Accounts, 75.

360. British Council, Official Development Assistance, [link](#).

361. CLARE Climate Adaption & Resilience, About, [link](#).

362. ICF funding goes through a number of mechanisms, including: British International Investment, the Ayrton Fund, Climate Investment Funds, Biodiverse Landscapes Fund, British Investment Partnerships, Green Climate Fund.

363. DEZNA, DEFRA and FCDO, Together for people and planet, 30 March 2023, 'Adaptation'.

364. HM Government, UK international climate finance results 2022, updated 19 July 2023, [link](#).

365. DESNZ, DEFRA and FCDO, Together for people and planet, 30 March 2023.

366. UKRI, ODA review, [link](#).

367. HM Government, Statistics on International Development: Final UK Aid Spend 2022.

368. Ibid.

fronts of geopolitical competition.³⁶⁹

Lammy's diagnosis is correct. It is true, as he wrote in an article last year, that "whether we look towards Asia, the Middle East, or Latin America, a struggle to persuade lies ahead that will... define the middle decades of this century."³⁷⁰ Certainly, our adversaries' successful 'Global South' outreach is cause for alarm. Not only have the UK and its liberal democratic partners ceded ground in the new battle for global influence, but we have scarcely acknowledged what is happening.

A flurry of 'Global South'-related activities indicates the new Government's focus on this foreign policy initiative. Prime Minister Sir Keir Starmer appointed Ailsa Terry his new Private Secretary for Foreign Affairs, who recently served as the British High Commissioner to Malaysia. The Government has also launched a new review of the UK's approach to development policy, to be chaired by Baroness Shafik.³⁷¹

The FCDO Minister for Africa, Lord Collins, has approached his brief with a great deal of energy. On his first overseas visit, he signed a £20mn loan deal with Angola.³⁷² The Minister followed this up with a £3.1mn aid package to help the Democratic Republic of Congo fight mpox and cholera,³⁷³ and then pledging £25mn investment into the continent's food and agriculture sector at the Africa Food Systems Forum.³⁷⁴ One week later, Lord Collins embarked on his first visit to West Africa, comprising growth-centred discussions in Ghana and Senegal.³⁷⁵

The problem is that, despite the step-change, there is still no overarching strategy driving this engagement. Given that the 'Global South' reset is a core Labour foreign policy objective, it is peculiar that the Prime Minister has not yet visited either Africa, Asia or South America. Indeed, he has met German Chancellor Olaf Scholz more times than he has made official calls with all African heads of state combined.

Meanwhile, this month the Attorney General Lord Hermer KC revealed major Global South-related policy in a lecture, announcing Labour will "advocate for reform" of the UNSC, including "permanent representation from Africa, Brazil, India" and others.³⁷⁶ In the absence of No 10's involvement, these individual moves appear disjointed and lacking in unified strategic intent. Strong foreign policy requires coherent leadership across the FCDO and Downing Street.

Yet, even more concerning from a strategic perspective is that the Foreign Secretary's overall approach to the 'Global South' contains an in-built incoherence: it occupies an uncomfortable middle ground between policy and strategy – thus mimicking the theoretical failings of development policy detailed above.

On the strategic side, Lammy has written that British foreign policy must harness soft power to prevail in an ongoing global "battle of ideas".³⁷⁷ To do so, the UK must launch a diplomatic assault "with a new effort to understand and listen" to the 'Global South', thereby "fighting for [its] hearts and minds"³⁷⁸. Just as values "succeed through their power to attract, not by force",³⁷⁹ so we must re-learn and re-apply the principles of soft power to attract the 'Global South' back into alignment

369. Lammy, The Case for Progressive Realism, May/June 2024.

370. David Lammy, Britain Reconnected: A Foreign Policy For Security and Prosperity at Home, *Fabian Society*, March 2023, 36.

371. Office of the President of Columbia University, Announcement from President Minouche Shafik, 14 August 2024, [link](#).

372. HM Government, UKEF puts €22 million loan behind Angolan clean water project, 15 August 2024, [link](#).

373. HM Government, UK steps up support to tackle mpox outbreak on visit to the Democratic Republic of the Congo, FCDO, 21 August 2024, [link](#).

374. HM Government, Minister for Africa pledges funding to accelerate growth in Africa agriculture sector, FCDO, 5 September 2024, [link](#).

375. HM Government, Minister visits West Africa to bolster partnerships for growth, FCDO, 16 September 2024, [link](#).

376. Joshua Rozenberg, Reform UN says AG: *Substack*, 15 October 2024, [link](#).

377. *Ibid.*, 36.

378. Lammy, The Case for Progressive Realism, May/June 2024.

379. Lammy, Britain Reconnected, March 2023, 36.

with our vision for world order. In this sense, 'Global South' engagement is strategic: *a ways of achieving an end*.

On the policy side, Lammy appears to view his new way of dealing with the 'Global South' as a moral compulsion, and so an end in itself of 'progressive realism'. In doing so, he channels the ideology which permeates 'Global Southism', and which demands *a priori* that the West relinquishes some of its political and economic power. 'Global South' engagement as a policy objective therefore mandates a string of concessions-based policies – or ways of achieving the ends – such as reparations and the restructuring of global governance towards multipolarity. In his words, the UK should not be “using the logic of realism solely to accumulate power”, but to support progressive causes.³⁸⁰ Viewed purely in a realist sense, such a policy mandates 'strategic' self-sacrifice when national interests clash with the universal.

THE CHAGOS ISLANDS AND STRATEGIC SELF-SABOTAGE

It is in the context of this confused grand strategy that the Government's decision over the Chagos Islands occurred.

Policy Exchange has already demonstrated the flawed legal basis of the Mauritian claim, and the importance of the Diego Garcia base to the UK-US strategic position in the Near and Far East.³⁸¹ Despite this, Labour decided to restart the negotiation process with Mauritius which had been initiated in 2022. A few months into government, and just weeks after Jonathan Powell's appointment as Special Envoy between the UK and Mauritius, a settlement was reached. The Chagos Islands are to become sovereign Mauritian territory, but the UK is to retain use of the Diego Garcia base on a 99 year-lease, with the option to renew at the end. The UK will pay the Mauritian government annually for the base.³⁸²

There is much reason to believe that the 'Global South' agenda was central to Labour's decision. Lammy announced to the House of Commons that “we are showing what we mean is what we say on international law and desire for partnerships with the Global South. This strengthens our arguments when it comes to issues like Ukraine or the South China Sea”³⁸³ The White House's statement echoed these principles, noting that the resolution demonstrates that “through diplomacy and partnership, countries can overcome long-standing historical challenges.”³⁸⁴

It is worth stating the exact trade-off in action in this decision, as it follows the equation which lies at the heart of a 'Global Southist' policy. In return for relinquishing hard power (a weakened strategic position in the Indian Ocean, and incurring annual payments), the UK hopes to receive future soft power (influence on other global issues).

Herein lies the internal contradiction of Lammy's worldview. He correctly identifies that the non-aligned world is driven by hard power strategic calculations over interests, but his solution is to double down on soft power responses – such as reaffirming our commitment to the legal and moral norms of the 'rules-based order'. The implications of the

380. Lammy, The Case for Progressive Realism, May/June 2024.

381. Dr Yuan Zhu, Dr Tom Grant and Professor Richard Ekins KC (Hon), Sovereignty and Security in the Indian Ocean: Why the UK should not cede the Chagos Islands to Mauritius, *Policy Exchange*, 27 October 2023.

382. HM Government, Foreign Secretary's statement on the Chagos Islands, 7 October 2024, [link](#).

383. HM Government, Foreign Secretary's statement on the Chagos Islands, 7 October 2024, [link](#).

384. The White House, Statement from President Joe Biden on the Occasion of an Agreement between the Republic of Mauritius and the United Kingdom on the Status of the Chagos Archipelago, 3 October 2024, [link](#).

Chagos decision for future negotiations over reparations, climate payments, and other contested overseas territories are plain to see.

Labour's 'Global South' engagement drive therefore lacks strategic clarity. To borrow military historian Hew Strachan's observation regarding the conflation of policy and strategy in post-Cold War British grand strategy,³⁸⁵ is 'Global South' engagement a policy which drives strategy, or a strategy which drives policy? The former would put the principles of 'Global Southism' writ large upon a pedestal, necessitating the formulation of policy strictly towards the goal of redistributing economic and political power globally. The latter would view engagement as a means to an end.

The latter approach could be coherent with a geopolitical ambition to protect national interest, and to counter the authoritarian states bent on dismantling the incumbent order. This would entail viewing re-focused engagement as a gateway towards developing strategic partnerships – access to critical minerals, economic ties which strengthen the Western economic system, diplomatic alignment in multilateral fora – which are explicitly designed to buttress the incumbent order.

However, such an explicitly strategic articulation of this new 'Global South' approach is absent. Instead, the Foreign Secretary seems poised to superimpose the astrategic brand of 'Global Southism' on to holistic foreign policy.

The danger of this is threefold: firstly, that preoccupation with soft power leads us to misconstrue the hard power dynamics driving geopolitical competition (access to critical minerals and markets, re-industrialisation, re-shoring and de-risking/de-coupling, the reordering of regional security architecture); secondly, that we formulate policies which subordinate national interests in the name of universal values; and thirdly, that we subscribe to a teleological narrative of global egalitarianism which has been developed, and is being exploited, to undermine us. In short, the danger is that British foreign policy becomes hamstrung at the very moment that strategic clarity is necessary. Just as our adversaries manipulate 'Global Southist' ideology to fit strategy, the UK is remodelling strategy around 'Global Southist' ideology.

FUTURE COSTS OF 'GLOBAL SOUTHISM'

Although the rationale for further engagement with the 'Global South' is to foster mutually beneficial relationships based on economic and diplomatic ties, as we have seen, it is by definition a concessions-based policy. If this is to become a more integral component of British foreign policy, it is therefore essential to enumerate exactly what financial commitments – both ongoing and future – this might entail.

Despite the reduction in aid budget from 0.7% GNI to 0.58% GNI in recent years, the UK is still a frontrunner amongst its 'Northern' peers. But there is a chasm between ongoing spending and the mounting financial demands of 'Global South' initiatives.

385. See Hew Strachan, *The Direction of War*, (Cambridge: Cambridge University Press, 2014), Ch. 1.

Last May, the consultation draft was issued for the third phase of the Bridgetown Initiative (3.0), the brainchild of Barbadian Prime Minister Mia Mottley. Drawing from a G20 independent expert group report, Bridgetown Initiative 3.0 calculated that Emerging Markets and Development Economies must increase climate spending by \$3tn/year by 2030.³⁸⁶ Within this, \$1tn must come from external donors, of which \$500bn would be public funds – one-third of which in concessional funds and non-debt creating financing, and the rest in non-concessional official lending. Multilateral development banks (MDBs) must hike annual climate financing by \$260bn – \$200bn as non-concessional lending. Bridgetown Initiative 3.0 also called on the IMF to issue a further \$500bn in special drawing rights (SDR) –³⁸⁷ up from the current figure of \$982bn.³⁸⁸ Finally, the World Bank's IDA21 (International Development Association, a fund which provides grants and subsidised loans to client developing states) should triple its funding levels by 2030, in line with the G20 Independent Expert Group's proposal.³⁸⁹

Whilst the exact financial obligations of these measures have yet to be apportioned to individual states, crude calculations of future commitments can be made based on the UK's current contribution share to MDBs, and total global aid donations.

Aid Channel	Current UK Commitment Bridgetown Additional Demand	Bridgetown Total Additional Demand	Total Future UK Commitment
IMF Special Drawing Rights	£15.5bn SDR quota* (4.23% of total IMF budget)	\$500bn	£21.15bn total
World Bank	£500mn/year**	Tripled IDA budget (c.\$90-270bn) by 2030	£1.5bn/year

**The maximum amount that the IMF can call upon from the UK, rather than an up-front financial commitment.³⁹⁰*

***Having been the largest single IDA donor (12-13% of total budget), in December 2021 the UK decided to reduce its share by around 50%. The Government stated that this was a temporary measure until fiscal conditions permitted restoration.³⁹¹*

The Bridgetown Initiative does not specify a deadline for the additional IMF SDR pot, so the assumption is that this is an 'as soon as possible' request. Assuming this occurs before the end of the current IDA term (2030), **the UK would incur a further £30.15bn in contributions to**

386. G20, The Triple Agenda: Report of the Independent Experts Group, Vol. 1., 2023, 13.

387. Victoria Masterson, The Bridgetown Initiative: here's everything you need to know, *World Economic Forum*, 13 January 2023, [link](#).

388. IMF, Where the IMF Gets Its Money, [link](#).

389. Bridgetown Initiative 3.0, Consultation Draft, 28 May 2024, 4.

390. See UK Parliament, Draft International Monetary Fund (Increase in Subscription) Order 2024, 13 May 2024, [link](#).

391. ICAI, Report: The UK's support to the World Bank's International Development Association, 31 May 2022, [link](#).

the Bridgetown Initiative by 2030 (21.15+1.5*6).

The pressure for further aid does not stop there. The Bridgetown Initiative is not the only active campaign for a vast wealth transfer from 'Northern' to 'Southern' states in the context of climate change and green development. At COP28, attendees operationalised the new 'loss and damage' fund with \$700mn.³⁹² The fund's premise is that it is the moral responsibility of states, whose economic development depended on fossil fuel consumption, both to compensate at-risk developing countries for climate damage, and to finance their own green development.

Needless to say, the initial \$700mn allocation goes no way towards satisfying these ambitions, which in truth can scarcely be quantified. One authoritative study in 2017 estimated that climate-related loss and damage for developing countries could reach anywhere between \$290-580bn by 2030, \$551bn-1tn by 2040, and \$1.1tn-1.74tn by 2050.³⁹³ Again, it is presently difficult to enumerate what demands might be made of the UK as part of UN compensation, or even the methodology behind such calculations – but again, whichever way it is cut, the figures will be dizzying.

One way of determining each country's dues towards environmental redemption might be to use their share in the global economy as a benchmark. **British GDP is 2.5% of global GDP, which would result in damage repayments of \$7.25bn-\$14.5bn by 2030, \$14bn-\$25bn by 2040, and \$25bn-\$43.5bn by 2050.** These numbers are on the basis that 'Southern' countries themselves will contribute proportionately to reparations; they certainly will not, given the premise of the loss and damage fund, and so the actual figures would be higher still.

A more commonly suggested approach, however, is to 'fine' each nation based on its cumulative historical emissions. One influential report published last year in the journal *Nature Sustainability* – which received wide media attention, particularly in India –³⁹⁴ argued that industrialised countries are liable to pay \$170tn to developing countries by 2050.³⁹⁵ **The UK's share of this would be £6.2tn (£240bn/year).**³⁹⁶ China and India, ranked first and third in annual CO2 emissions today, would be owed compensation in this model: 66% and 6% of GDP/year respectively.³⁹⁷

Averting climate catastrophe is an existential matter, and the UK must do all that it can to meet this objective. However, there are important and unanswered questions about where moral obligation lies: are the historical emissions of countries now ahead in the green transition more reprehensible than contemporary emissions of developing states?; do governments (and therefore tax payers) accept full liability, or do fossil fuel companies have a price to pay?; are petroleum exporting countries, which are also suffering from climate change, eligible for their share of reparations?

These remain live and hugely consequential issues in the climate debate. Such a monumental wealth transfer necessitates that the

392.UN, COP28 Agreement Signals "Beginning of the End" of Fossil Fuel Era, 13 December 2023, [link](#).

393.Anil Markandya and Mikel González-Eguino, "Integrated Assessment for Identifying Climate Finance Needs for Loss and Damage: A Critical Review", in R. Mechler et al., *Loss and Damage from Climate Change*, 2019, 349.

394.For example, PTI, Rich over-emitting nations owe India USD 1,446 per capita until 2050 as compensation, new study says, *Indian Express*, 7 June 2023, [link](#); and *Times of India*, 6 June 2023, [link](#).

395.Andrew L. Fanning and Jason Hickel, Compensation for atmospheric appropriation, *Nature Sustainability*, 5 June 2023, 1077.

396.Ibid., 1088.

397.Ibid., 1080.

industrialised world must be an active agent – rather than passive bystander – in negotiations. This will inevitably involve fierce horse-trading. Only at the end of 2022 did the US resile from its longstanding blanket rejection of paying reparations – but only on the terms that China pays too. In response, China attempted to garner goodwill by claiming that it has no obligation to do so, but will nonetheless contribute – but not financially.

The UK cannot allow the principles of 'Global Southism' to obfuscate the interests-based nature of these negotiations, or else naivety will incur stratospheric costs. Only a rational debate can strike the balance between historical and contemporary equity.

398. Zack Colman and Karl Mathiesen, New U.S. message on climate change: Make China pay, *Politico*, 5 November 2022, [link](#).
399. Gloria Dickie and William James, China will support climate damage mechanism but not with cash, *Reuters*, 9 November 2022, [link](#).

Chapter V: A 'Non-Global South' Strategy for the Global South

Strategy must be made on the basis of facts. There is no other way to identify the interests, means, and challenges at play.

The 'Global North-Global South' paradigm does not provide a factual basis for strategic assessments. It represents little more than a rhetorical device. More often than not, it is a rhetorical trap, one that furthers the interests of our authoritarian adversaries, thereby weakening and delegitimising liberal democracy and open markets. The framework poorly reflects political and economic realities. It obfuscates the independence and parsimony of states, all of which have unique sets of interests and priorities, unique political systems, and unique histories. Swallowing the narrative is hardly a precondition for constructive and mutually respectful relationships. Letting the 'Global South' slide into casual use, without critically engaging with the history of the idea and in particular, with its long history of weaponisation as a tool in political warfare, will inevitably lead to strategic own-goals. There are ample reasons to reject the paradigm. In the current geopolitical environment, that is truer than ever.

As was the case throughout the Cold War, Russia and China flagrantly weaponise the 'Global South' narrative to attack the West's global reputation, to undermine the moral foundations of open markets and liberal democracy, to wage a propaganda war against the UK and its allies, and to limit our foreign policy by defining the terms and setting the tone. The objectives are clear: sabotaging the UK's reputation; defanging its hard power; locking it out of vital regions; sowing discontent and diffidence within Western societies; and, in the long-run, inducing strategic retrenchment. The playbook is borrowed from the 1970s and 1980s, although the danger has been amplified by technology and the increasingly-complex dynamics of financial statecraft.

Good intentions can serve as the prelude to strategic failure. Particularly where those good intentions are ill-founded, this outcome can and should be averted. British policymakers must develop new, savvier forms of strategic engagement with the regions of the so-called 'Global South'. They must equally mount a response to the deep anti-Western invective that infects 'Global Southism'. In short, the UK needs a 'non-Global South' strategy for the 'Global South'.

We suggest the following recommendations as a way forward:

Conceptual

The first step is to acknowledge the strategic liabilities of tailoring policies on the basis of 'Global Southism', and to acknowledge the cynical use of this narrative in geopolitical competition—both past and present.

- **The 'Global South' must not be used as a framing device, or as a reference point, for foreign policy and strategy. The Integrated Review's reference to 'middle-ground powers' – those which display a preference for geopolitical and ideological non-alignment – is a more accurate and preferable term to the 'Global South'.** As we have made clear, the 'Global South' is a poor fit to be a guiding framework for British strategy. This is more than semantics, but is meant to prevent the use of a framework that perforce advocates a "light touch" approach to geopolitically-contested regions and, moreover, encourages a policy of signalling in the form of concessions-based overtures (soft power). The 'Global South' is a red herring: rather than wasting time and resources deliberating how an amorphous 'imagined community' is positioning itself on the key matters of our time, we should focus on specific state interests. This means formulating strategy on the basis of traditional analysis of 'middle-ground powers', understanding objectives and interests in the context of the most important global trends. A framework that lumps together Saudi Arabia, Gabon, China, and the Philippines is of no use to this end.
- **The UK must offer an alternative vision to 'Global Southism' and its inherent delegitimisation of the West. This is not at odds with the Government's 'progressive realism', but requires a shift in emphasis away from atonement to one focused on the strength of liberal values and the benefits of free markets.** The message must be unequivocal: strategic cooperation on climate change, investment, and economic development are positive 'progressive' outcomes. Furthermore, Western success is not a simple story of exploitation but the product of economic and social benefits that can only exist in an open society. The last point need not be framed as a criticism of other states. It is, however, a fact that corruption and the abuse of state power are tamed by a free press, the accountability of politicians, and public participation in politics, and that those things are conducive to freedom and innovation. Failing to contest the claims of our authoritarian rivals has implications for our global standing, as well as implications here at home. This alternative narrative helps bridge the seeming gap between national values and national interests. Strategic partnerships with critical mineral exporters, for instance, can be cast as resisting market domination by authoritarian and predatory states with questionable rule of law, or neomercantilism backed by mercenaries. Otherwise, as was seen recently when the EU

came under criticism for reaching a minerals deal with Rwanda (a known entrepôt for Congolese minerals smuggled by M23 rebels), setting high progressive standards can backfire and hamstringing policy options – even as our adversaries pursue the very same approach. Open commitment to the 'Global South' narrative, without any pushback against the free ride it gives to non-Western neo-imperialist states, will lock in these policy constraints.

- **The British Government should hold an internal discussion to determine its stance on future reparation negotiations. This must involve the National Security Council (NSC), the Treasury, and the Ministry of Defence, to ensure that values-based considerations are appropriately weighted against hard power interests.** The UK can only balance the trade-off between values and interests once it has clearly defined its own terms of reference for negotiations with the 'Global South'. It is naïve to ignore the fact that reparations are a form of strategic leverage which can be applied towards broader geopolitical objectives. This process should not occur in the public domain – indeed, any hint of discord will inevitably be seized upon – but there is a growing need for the UK's strategic establishment to decide its own red lines and parameters, before they are imposed externally.
- **The Foreign Secretary should make a statement which asserts that the battle with illiberal authoritarianism is a core 'progressive realist' objective.** The UK must be unequivocal in its conviction that upholding a liberal world order in the face of authoritarian challenge is a progressive objective. Discourse matters in diplomacy, and the UK needs to shift the focus on to cooperation with the 'Global South' on contemporary global issues. The key part of the Foreign Secretary's message must be that the UK will not be cajoled into sacrificing its interests to the benefit of illiberal authoritarian states. By framing this as a coherent objective of 'progressive realism', the UK can avoid the notion – peddled by our adversaries – that our interests and values are oxymoronic.

Policy

Having adopted a more strategic approach to the 'Global South', the UK must develop new policies to compete more effectively in regions of direct consequence for our interests.

- **The UK should propose a coordinated global offering in tandem with its partners, particularly the G7 and select members of the G20. This could be called a 'New Growth Partnership' for Africa, Latin America and Asia, predicated on strategic economic development, climate risk mitigation, and**

respect for law and human rights. This model would be a direct response to China's global initiatives (GDI, GSI and GCI), and Russia's elite-focused security-economic deals. Russian and Chinese inroads across the globe are the fruits of carefully targeted overtures, aimed squarely at the political and economic interests of political elites, and afforded cover by 'Global South' rhetoric. In turn, 'Southern' states are simply conforming to the dictum of economic theory: that rational market actors will shop around for the most advantageous arrangements.

The UK and its partners must respond with a competitive offer. Disparate efforts are already underway. The EU launched the Global Gateway (GG) in 2021, pledging €300bn between 2021 and 2027 for investment in infrastructure projects worldwide with a focus on Africa. In 2021, the G7 created the Build Back Better World initiative, which was subsequently re-packaged as the Partnership for Global Infrastructure and Investment (PGII). The PGII has pledged \$600bn by 2027 and is based on the Blue Dot Network certification framework for quality projects. Both are a response to China's BRI. However, they lack a coordinated and compelling overarching narrative through which the West can counter the 'Global South' narrative.

The 'New Growth Partnership' would in part re-launch the above initiatives under the aegis of a liberal vision for global progress. This would offer solutions to the climate and development concerns of the 'Global South' within the incumbent international framework – thereby challenging our adversaries' claim that only a new order can achieve this outcome. Most importantly, 'Southern' partners should be invited to attend high-level meetings, particularly G20 members like India, Saudi Arabia, Indonesia and Brazil. As the GG, PGII and other multilateral initiatives covered in this report prove, the West is the frontrunning investor in issues of pressing importance to the 'Global South'. We should be forceful in defending this track record, positioning ourselves in pointed opposition to the self-serving activities of Russia and China. In short, this means outgunning the economic incentives of our competitors by playing to our strengths.

- **As part of the 'New Growth Partnership', it is essential that the UK finds new ways to harness private finance via public-private partnerships in the 'Global South', so as to compete with the state-driven financial statecraft of China.** Money talks, and Western states have significantly greater financial resources than their rivals, particularly when private investment is priced in. In addition to multilateral development banks and financial

institutions, it is necessary to consider how the British state can further incentivise the private sector to appeal to the interests of strategically-vital countries in the developing world. Beneath the superficial glaze of the 'Global South' narrative, the West has many shared interests with developing countries in terms of economic development and critical investments: infrastructure, logistics, and resource extraction, along with job creation and better welfare. More often than not, it is the British private sector, and not the British state, that is best equipped to attend to these interests. A more serious conversation is needed about how to make this easier in the context of the UK's strategic priorities.

- **UK Export Finance (UKEF) and British International Investment (BII) should be given further state support and more ambitious investment-raising targets, as well as an expanded risk scope to invest in sectors of strategic importance in the 'Global South'.** UKEF is an important public vehicle for attracting private finance for British businesses with overseas activities. In the year 2023/2024, UKEF provided £8.8bn of support to British exporters and overseas buyers, and its business plan for 2024-2029 has set the milestone of mobilising £10bn of finance in low- and middle-income countries.⁴⁰⁰ The new Government can prove its attentiveness to the 'Global South' by doubling this target. Furthermore, new guidelines should be set which make industries of strategic importance – such as critical mineral and precious metal extraction and processing – an investment priority, and UKEF and BII's public funding should be increased to offer the necessary risk mitigation to businesses.
- **The FCDO must develop bespoke foreign policy strategies for Africa, the Middle East, Central Asia and Latin America – avoiding the one-size-fits-all 'Global South' framework.** Promisingly, Labour's manifesto hinted at a new Africa strategy as it pledged to “deliver a new approach to the continent to foster opportunities for mutual long-term benefit.”⁴⁰¹ This is especially critical given recent Russian inroads in the continent, posing a real and direct threat to NATO's southern flank in the long run. That said, it is unclear in light of the Foreign Secretary's 'progressive realism' whether this strategy will be centred around British national interests. The FCDO's recent invitation for tenders on promoting export-led economic transformation under the SACUM/UK (Southern African Customs Union + Mozambique) Economic Partnership Agreement indicates a suitable focus on discrete priorities, and could serve as a prototype for further strategic economic engagement elsewhere. It is lamentable, however, that the UK does not possess recently-updated bespoke strategies for, *inter alia*, Africa, the Middle East, Central Asia or

400. UK Export Finance, UK Export Finance Business Plan 2024-2029, 21.

401. Labour Party, Change: Labour Party Manifesto, 2024, 122.

the Indo-Pacific region. The FCDO must rediscover the role that diplomacy and economic statecraft (aid and trade) play in grand strategy by developing regional approaches.

- **Enhancing strategic relations with our 'Southern' partners requires diplomatic messaging which differentiates between them and China and Russia.** Through the Commonwealth, the G20, the Five Power Defence Arrangements, our mission to ASEAN, and imminent CPTPP accession, the UK has deep political and economic relationships with many 'Southern' states. Our rhetoric must signal that we view these partnerships as valuable and entirely distinct from Russia and China. This means avoiding categorisations which lump them together.
- **The Government's upcoming review of its approach to international development, chaired by Baroness Shafik, is the perfect opportunity to revive this policy instrument's role in economic statecraft. The review should reinstate national interests as a core criterion for FCDO ODA funding, and propose creative ways to engage the private sector in British aid.** Since the Pergau dam scandal of 1993, the UK's development establishment has been averse to being seen as an agent of the state and private sector. It is no coincidence that British overseas ODA initiatives now consistently score poorly in terms of strategic effectiveness, given that they pursue lofty socio-political ambitions with relatively modest sums. As geoeconomic competition increases in contested regions, the UK has to respond by modifying its ODA terms of reference. For example, bilateral deals to secure access to critical minerals should be coupled with an array of local aid programmes. Far from being a cynical approach, this would enhance our offer to recipient states by supplementing economic benefits with societal development assistance. It would be far better for 'Southern' countries to enter into such partnerships with the UK, than with authoritarian states which pay no regard to the wider impact of their engagement.
- **Towards this aim, 75% of FCDO ODA funding should be ringfenced for projects which clearly articulate how they will serve our overseas interests, with the remainder available for purely humanitarian objectives.** Aid has succumbed to allegations that it does not contribute to British interests, leaving it an open target for budget reductions. It is therefore in the third sector's interests to adapt by demonstrating that it can more effectively couple its humanitarian objectives with geostrategic goals. NDPBs receiving FCDO funding should be put on notice that they have a strategic role to play.
- **Ultimately, the UK cannot reverse the tide of Russian and**

Chinese progress across the 'Global South' alone. The Government should therefore host a series of region-specific discussions with our partners, with the aim of devising a collaborate approach to countering Beijing and Moscow's influence campaigns. Each state has its own regional objectives, but we all have a common goal in arresting Russian and Chinese influence. The spiralling situation in Africa is in part the product of strategic surrender: American and French retrenchment; the EU's inability to formulate an effective common security and defence policy; and the UK's inattentiveness to its own interests in the continent. Reversing the trend of loss of strategic control cannot be achieved single-handedly by any one state, but must be pursued through a joint approach to the policy areas detailed above. The UK should initiate a coordinated strategic approach to the 'Global South' regions with the narrow focus of challenging Chinese and Russian activities.

Operational

Within this policy framework, the Government must enhance its operational capacity in the 'Global South'.

- **The UK should signal its enhanced engagement with the 'Global South' by ensuring that it has a diplomatic presence in every constituent state.** Even a modest outfit – such as one diplomat, a defence attaché, and supporting staffer – is crucial to nurturing bilateral relationships, providing support to expats, intelligence gathering, and improving regional awareness and expertise. At present, the UK has no consulate or embassy in over ten African states, including many of growing strategic importance: the Central African Republic, Congo, Djibouti, and Burkina Faso to name a few. Meanwhile, the Indo-Pacific Tilt is constrained by our lack of diplomatic presence in the Marshall Islands, Palau, and Nauru, *inter alia*.⁴⁰² Expanding our reach to 'small states' is essential as these 'Lilliputian' actors⁴⁰³ are increasingly able to influence regional dynamics amidst geopolitical flux. Small-scale diplomatic outfits have a critical role to perform as a local node for economic, security and geopolitical activities.
- **The Government must establish a designated team in the National Security Secretariat (NSS) to counter anti-Western disinformation across the 'Global South'.** The UK and its European allies have reacted swiftly and effectively to Russian disinformation on our own continent, but this attention must be expanded to similar activities overseas. This report has demonstrated the 'free shot' our adversaries are taking at our reputation in contested regions, which aggressively plays on 'Global Southist' tropes. This new team would provide the NSC with regular analysis of

402.HM Government, Find a British embassy, high commission or consulate, [link](#).

403.The term used by political scientist Christine Ingebritsen to describe small states which are able to exert regional influence efficiently, thereby gaining leverage over larger states ('Gullivers'). See Christine Ingebritsen, Learning from Lilliput: Small States and EU Expansion, *Scandinavian Studies*, 76 (3), 2004, 369-384.

Russian and Chinese disinformation campaigns, enabling counter measures to be designed. The unit should be in regular contact with regional embassies and consulates to ensure up-to-date situational awareness.

- **The FCDO should establish 'early warning' regional units to flag pre-emptively situations fertile for adversarial exploitation in the 'Global South'. These units could work alongside the Army's 77th Brigade, and GCHQ's Joint Threat Research Intelligence Group, to develop active counter-disinformation operations.** Russian activities across Africa in recent years reveal a standard textbook for compounding and capitalising on instability. These new units – which would combine regional specialists with experts in Russian active measures – should monitor social media as well as economic, social and political developments, and provide 'early warning' alerts to spur a wider governmental response. These units should report to the new NSS team to develop effective counter-campaigns, and should – when possible – publicise intelligence both at home and within the relevant region regarding Chinese and Russian disinformation methods.
- **MI6 should stand up a unit modelled on the CIA's National Resources Division. This British National Resources Division (BNR) would be tasked with identifying British and foreign citizens with business links in the 'Global South', with a view to either recruiting them, or receiving valuable intelligence to form a granular understanding of the regional private sector and political landscapes.** The CIA's NR finds and cultivates contacts with strong connections to the target state's business world, in order to improve its situational awareness in the private sector. This type of service would be helpful for the UK as it develops a more strategic approach to the 'Global South' – particularly when it comes to navigating critical mineral markets, which are opaque and fairly informal. Collecting intelligence in murkier business areas via the BNR would bypass some of the restrictions that official diplomatic personnel face in such environments.

Appendix

The Anti-Imperialist and Marxist Origins of 'Global Southism'

Anti-imperialism is not as old as imperialism if only because for the majority of history, empires have been a default and ubiquitous unit in international life.⁴⁰⁴ The repudiation of empire is a relatively modern phenomenon, one which began with the coincidence of the moral and economic crises in 17th century Europe. The moral and economic arguments of empire in many respects grew up together. Recognising the historic contingency of these ideas helps us understand how the idea of the 'Global South' emerged from these early debates about fairness, representation, and exploitation, and the historical and intellectual novelty of the Marxist interpretation that has persisted to this day.

The period between the 1490s and 1650 – popularly termed 'Old Imperialism' – was governed by the zero-sum mercantilist notion of a competition for finite global wealth, which drove rapid imperial expansion across the New World.⁴⁰⁵ It was in this context that the first moral critiques of colonialism arose in the late early 16th Century, primarily on the grounds of Christian natural law. The counterpoint to this argument—the 'civilizing mission' of Christian Europe—arose in the same milieu.⁴⁰⁶ The rise of the luxury trade would prompt another furious debate about the merits of colonialism, on the grounds that luxury prompted indolence and decadence. Counter-arguments to these claims sowed the seeds of many central assumptions of the Enlightenment: human perfectibility and the march of technological progress.⁴⁰⁷ Europe's extremely costly continental wars prompted an intense period of debate in the 18th century, which fuelled the first theories of free trade.⁴⁰⁸

Technological change led to another break in how imperialism was practised and interpreted. The First Industrial Revolution gave to English manufacturers more efficient production lines, and higher quality goods, than their foreign rivals, promising decisive commercial advantages in overseas markets. Whilst this initially supported proponents of *laissez-faire* economics, who found fault with colonial systems of commerce, the voracious demand for raw materials and new markets – enabled primarily by the advent of steam-powered cargo vessels and the factory system –⁴⁰⁹ ultimately ushered in a second era of imperialism (1870-1914), the so-called 'New Imperialism'. This time, it was Britain, France, Germany, the United States, Italy, Belgium, Russia and Japan which dominated the imperialist landscape, driving rapid and intensive expansion across Central and East Asia, Africa, Oceania and the Americas.⁴¹⁰

404. For more, see John Darwin, *After Tamerlane: The Global History of Empire since 1405*, (London: Allen Lane, 2007).

405. J.H. Elliott, *The Old World and the New: 1492-1650*, revised ed., (Cambridge: Cambridge University Press, 2011), 7.

406. Jo-Anne Claire Pemberton, 'The So-Called Right of Civilisation in European Colonial Ideology, 16th to 20th centuries', *Journal of the History of International Law*, 2013 (15), 25-52.

407. For more on this debate, see Istvan Hont, *Politics in Commercial Society: Jean-Jacques Rousseau and Adam Smith*, (Massachusetts: Harvard University Press, 2015).

408. For example, see Robert Livingston Schuyler, 'The Rise of Anti-Imperialism in England, 1820-1840', *Quarterly Journal of Economics*, 1922 37 (3), 440-471, [link](#).

409. Rob Bassett et al., 'AI power and British strategy', *Council on Geostrategy*, March 2024, 11.

410. Joseph Leigh, 'The emergence of global power politics: imperialism, modernity, and American expansion 1870-1914', PhD thesis 2020, *London School of Economics and Political Science*, 4.

Free-trade critiques of colonialism arose in Britain in the 18th century. Anti-imperialism began with an economic rather than a moral critique. Josiah Tucker, who published a series of pamphlets during the American Revolution, which advocated for the surrendering of the American colonies, argued that the cost of keeping colonies was a “millstone hanging about the neck” of Britain.”⁴¹¹ Moreover, he argued that the tension between coloniser and colonised would end in revolt and war, imposing additional costs on the colonial power. The seminal early work advocating for the dismantling of colonies was none other than Adam Smith, in his *The Wealth of Nations*, although he was preceded by a group of French physiocrats,⁴¹² who emphasised the burden which sustaining colonies had on the ‘Mother Country’.

Smith’s central contention was that the closed market system of colonialism amounted to a form of monopoly by vested political and industrial elites,⁴¹³ distorting industry in the colonies and at home. This ultimately depressed industrial productivity and made their prices less competitive in other markets.⁴¹⁴ Smith’s work spearheaded free trade economics and was seemingly vindicated by Britain’s emergence as the ‘workshop of the world’ during the 19th century, in large part due to soaring exports to the newly-independent American territories and the unparalleled dominance of British goods in European markets.⁴¹⁵

Alongside the economic critique of colonialism, a moral critique of colonialism emerged in the 1750s (although few emerged that criticised the practice of colonialism wholesale). John Cartwright, for example, earned the title ‘The Father of Reform’ for his 1774 pamphlet *Take Your Choice*, in which he advocated universal suffrage in the American colonies. To make his critique, he and Richard Price applied the Lockean rights of the individual to own and control their labour and property to the colonists (though they did so with no regard for indigenous peoples).⁴¹⁶ Because the colonies were not represented in Parliament, imposing British legislation on them constituted an immoral “state of slavery”.⁴¹⁷ This equality-based argument would ultimately take particular root in the French Revolution. Nonetheless, the ideals of complete political liberty and human rights did not by any stretch translate into the abjuration of empire by France or any other country. They did, however, have enormous implications for radical politics which would reverberate throughout the 19th century, particularly with regard to moral critiques of colonialism and, later, of empire.⁴¹⁸

Over the following decades, the principles of utilitarianism and *laissez-faire* economics became fused in the works of those such as James Mill, David Ricardo, Thomas Robert Malthus and, in particular, Jeremy Bentham.⁴¹⁹ Bentham echoed first-wave anti-imperialist arguments that colonial enterprises increase the risk of war,⁴²⁰ and further came to argue that colonialism tended to perpetuate the vested interests of ruling elites, which ran against the ‘greater good’.⁴²¹ He is thus credited with interpreting *rentierism* long before the school of economic thought emerged: this would be a key idea later down the line as domestic critiques of colonialism and imperialism began to emerge.⁴²²

411. Josiah Tucker, *Four Letters on Important National Subjects*, second ed., (Gloucester: R. Raikes, 1783), 7.

412. The physiocrats were a group of French economists who viewed agriculture as the source of all wealth, and free trade as the optimal economic model for attaining mercantilist superiority. For example, the elder Mirabeau, *Philosophie rurale*, III (Amsterdam, 1763), 224.

413. For example, see *The Wealth of Nations*, 493: colonialism turned trade, which “ought naturally to be among nations, as among individuals”, into “the most fertile source of discord and animosity.”

414. Adam Smith, *An Inquiry Into the Nature and Causes of The Wealth of Nations*, 1776, (Pennsylvania State University Electronic Classics Series Publication, 2005), 479, [link](#).

415. Livingston Schuyler, The Rise of Anti-Imperialism in England, *Political Science Quarterly*, 1922 37 (3), 462.

416. Major John Cartwright, *Take Your Choice*, 1776, accessed *History Home*, [link](#).

417. Richard Price, *Observations on the Nature of Civil Liberty: The Principles of Government, and the Justice and Policy of the War with America*, 1776, (The Online Library of Liberty), 16, [link](#).

418. In the English-speaking world, an example of the effect which the Revolution had on the colonialism debate was William Godwin, one of the first exponents of utilitarianism. Unlike his forerunners, who tended to denounce colonialism on economic grounds, Godwin expressed moral disapproval of the subjugation of one body of people by another, and of depriving fundamental rights. In his 1793 *Enquiry concerning political justice*, Godwin wrote that the colonialisation of communities is a “usurpation” of the “privilege of being governed by the dictates of their own reason.” William Godwin, *An Enquiry concerning Political Justice*, vol. 2, (London, 1793), 532.

419. Livingston Schuyler, The Rise of Anti-Imperialism in England, *Political Science Quarterly*, 1922 37 (3), 465.

420. Jeremy Bentham, ‘Emancipate Your Colonies!’, *Rights, Representation, and Reform*, 1793, 290.

421. Jeremy Bentham, ‘Observations on the Restrictive and Prohibitory Commercial System’, 1821, 371-2.

422. For more on this, see M. Olsen, *The Rise and Decline of Nations: Economic Growth, Stagflation, and Social Rigidities*, (New Haven, 1982).

By the mid-19th century, such anti-imperial critiques grew increasingly mainstream. Nevertheless, a new wave of territorial expansion swiftly arose in the 1860s. The Second Industrial Revolution massively improved transportation and productivity, spurring a new era of geopolitical rivalry. The era of New Imperialism (1870-1914) meant renewed European imperialist policies pursuant of further resources and new markets, complemented by American and Japanese expansionism in the Americas and Asia.

This second phase radically re-energised its critics in the West, a trend empowered by Victorian moralism, a significant increase in the public's knowledge and involvement in foreign policy, and widening political participation. It also energised the supporters of imperialism, who became significant domestic constituencies in the United Kingdom, France, Germany, and elsewhere. Of the British critics, perhaps the most influential early critical was J. A. Hobson, whose 1902 *Imperialism: A Study* focused on the class inequalities produced in Britain as a result of the colonial enterprises of the wealthy.⁴²³ Hobson's work similarly combined anti-colonial sentiment with a capitalist class analysis, the likes of which began to appear on the European Continent half a century earlier in the guise of Marxism.⁴²⁴

Just as British utilitarians denounced imperialism as a sub-optimal distribution of 'the good', an alternative critique of capitalism emerged in Germany. Karl Marx critiqued capitalism's inbuilt proclivity to distribute wealth along class lines unequally. *Das Kapital's* scope is vast, but Marx's historical materialism is especially relevant to our subject. Marx's analysis claims an eternal conflict over the 'means of production', the physical and economic assets that enable productivity. In the modern capitalist context, this conflict has become one between the 'proletariat' and the 'bourgeoisie'. This conflict produces unsustainable inequalities, which must eventually be forcibly replaced by a socialist mode of production, a dialectically-deduced teleological outcome that Marx concluded must at some point be the case. This theory claims to be universal and applicable to all societies – whether they are already capitalist or feudal in nature. All pass through the same process, before attaining the utopian equality which is only possible within 'post-capitalist' systems. In this regard, Marxism is a comment on the essence of human history.

Viewing imperialism through this lens, Marx initially perceived imperialism as a potentially "progressive force for the working class",⁴²⁵ the logic being that it could drive their "emancipation from feudalism" by replacing feudal modes of production with a flowering industrial capitalism that could generate a proletariat.⁴²⁶ In London, however, he encountered the Chartists, a working-class group forcefully opposed to the British colonisation of Ireland. As a result, Marx became increasingly critical of colonialism, targeting in particular British rule in India which, in 1853 he called "the inherent barbarism of bourgeois civilisation."⁴²⁷ Marx saw the inequality of colonised and coloniser as a class problem. The solution, in his view, could be an uprising amongst the British

423. J. A. Hobson, *Imperialism: A Study*, originally 1902, (London: Spokesman Books, 2011).

424. Peter J. Cain, Bentham and the Development of the British Critique of Colonialism, 2011, *Utilitas* 23 (01), 1.

425. Thierry Drapeau, The Roots of Karl Marx's Anti-Colonialism, *Jacobin*, 1 April 2019, [link](#).

426. Karl Marx and Frederick Engels, Manifesto of the Communist Party, February 1848, Marx/Engels Selected Works, vol. 1, *Progressive Publishers*, 59, [link](#).

427. Karl Marx, The Future Results of British Rule in India, 22 July 1853, printed in *New York Daily Tribune*, 8 August 1853, 5, [link](#).

working class against the colonising elite, or, an emancipatory struggle by the indigenous people themselves. This lack of distinction between the preferred *means* of class emancipation illustrates Marx's perception of the shared plight of the colonised and working class in the global capitalist system, and their shared path towards ultimate liberation. This fusion would have profound implications for global developments in the 20th century and beyond.

The success of the Bolshevik Revolution in 1917 gave Marxism a global platform and inspired independence movements worldwide, to the extent that Marxism became wholly imbued in the framing of anti-colonial struggles in the first half of the 20th century. From Egypt's Gamal Abdel Nasser, to Ghana's Kwame Nkrumah, to Algeria's Ahmed Ben Bella, to Tanzania's Julius Nyerere, revolutionary leaders across the Third World applied Marxist 'insights' – directly or in their own idiosyncratic interpretations – to their anti-colonial missions.⁴²⁸ Intellectuals supportive of independence often grappled with the intrinsic contradiction of the universal class narrative of Marxism and their own particularist nationalisms. The same goes for the profoundly Eurocentric nature of Marx's writing, insofar as it is the product of a place and time, but rejects its own historical and intellectual contingency. This tension was, for example, expressed by pan-Africanist Amílcar Cabral's comment that "we will use the Marxian method. [But] we will not be tied by the concept which arose historically in Western Europe when Marx was studying that society."⁴²⁹ Nevertheless, the two ideologies became insolubly intertwined to the extent that both informed the liberation movements of the 20th century – a fact reflected in that very terminology – as well as the rise of development economics, a field largely based on Marxist priors.

The evolution of Marx and Engel's analysis of imperialism was driven and supported by the political motivations of the new Soviet state, which identified the synergic potential of the two worldviews to spread anti-Western sentiment globally.⁴³⁰ Vladimir Lenin's *Imperialism: The Highest Stage of Capitalism* (1917) was a watershed moment in the divergence between Marx's original interpretation of imperialism's function in the socialist revolution, and the politicised rejection of Western colonialism that the Soviets would subsequently propagate. Under the leadership of Lenin and other senior Bolsheviks, the Communist International (Comintern) was established in 1919 to support "those revolutionary forces that are working for the overthrow of imperialism in the countries subjected politically and economically".⁴³¹ This was a reference to movements sprouting up in Asia, Africa, and Latin America. One of the first acts of the Comintern was to call for the immediate independence of Africa.⁴³² Here, the Soviet detour from Marxist principles on imperialism was clear: imperialism was no longer perceived as a step towards the emancipation of the working class, but as an aberration which perpetuated global class divides. This rupture culminated in the 1928 Sixth Congress of the Comintern, which decisively rejected Marx's position in favour of the re-interpreted, fiercely anti-imperialist narrative.⁴³³ Thus, even before the emergence of modern

428. For more, see Peter Dwyer and Leo Zeilig, *Marxism, class revolution in Africa: the legacy of 1917 Russian Revolution, International Socialism*, 2018 (157), [link](#).

429. Quoted in Walter Rodney, *Marxism and African Liberation*, in a speech given at Queen's College, New York, 1975, 10, [link](#).

430. *Ibid.*, 4.

431. The Second Congress of the Communist International, *Proceedings of Petrograd Session 17th July and of Moscow Sessions 19th July-7th August, 1920, Revolutionary Democracy*, 81, [link](#).

432. *Ibid.*, 81.

433. *Ibid.*, 85.

global developmental theories, it is observable how efforts to address global inequalities and historical grievances were manipulated by political forces.



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